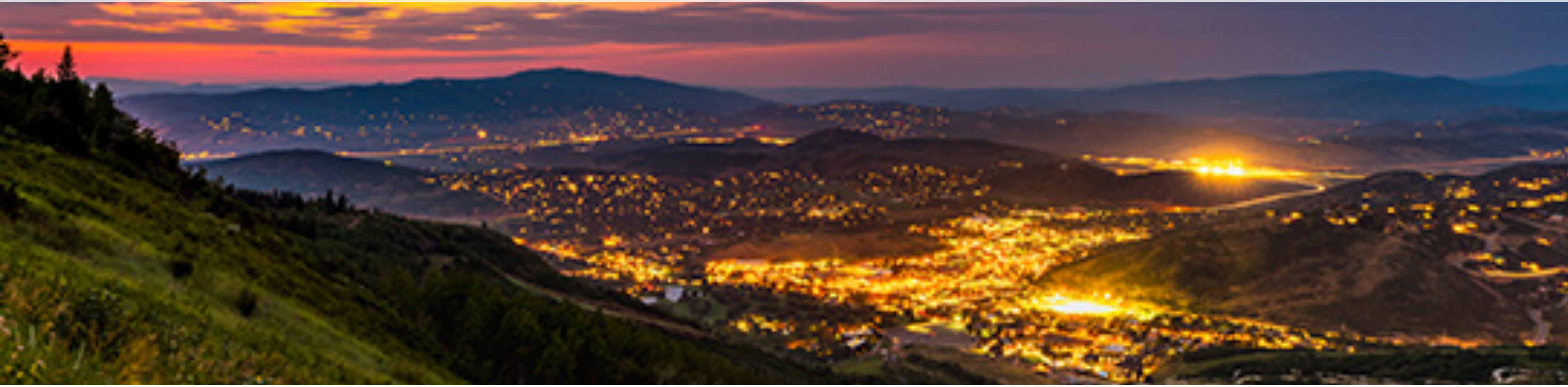
Calendar Year 2017 – Utah TravelTrakAmerica Visitor Profile Report & Insights



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Growth Summary

Growth insights

- Continue efforts to attract new visitors by enticing those living in or traveling to Western US areas to add or extend trips to Utah (including non-border states – a broader reach than most travel destinations).
- Visitor counts have plateaued to approximately 19 million travelers from a peak in 2016. Volumes have been helped by an uptick in Out-of-State arrivals, an important market due to their higher average spending and longer average stays.
- Continue engaging Adventure Sports & Sports and Recreation travelers – niche, high-spending segments. These activities may be initial catalyst however, Utah's other amenities may encourage them to stay.
- Entertainment/Amusement travelers continue to be the most lucrative visitor type as a percentage of revenue – maintain outreach to these travelers while also monitoring this area in the future.
- Utah travelers rely heavily on the internet and online sources for information on products/services – more so among Out-of-State visitors who use this extensively to plan their trips. All travelers (In and Out-of-State) depend on the internet to book their travel plans. Although some Utah visitors spend a great deal of time on social media, fewer rely on it for advice/recommendations for brands, products, and services.
- "Imports" (Utah visitors spending their leisure dollars elsewhere) continues to be below the combined level of "domestic spending" + "exports" – yielding a slight positive outcome in spending.

Precise plans for growth

- Adventure Sports and Sports/Recreation may initiate a trip to Utah, however Arts/culture, history, and of course, other outdoor activities can help to solidify interest in the State and promote repeat visits.
- CY 2017 saw renewed interest in Utah's National and State Parks – build on this interest and capture further attention.
- Look to expanding Utah's online presence to reach new potential visitors with its already excellent website and owned social media sites (Facebook, Instagram, Twitter, etc.).
- Encourage residents to promote Utah (act as ambassadors) to their friends and family, showcasing the state when they visit. Perhaps through social media channels as fully 1-in-3 Utah visitors say they spend a great deal of time with social media platforms.
- Build on the momentum of growing out-of-State visitors; These travellers, particularly those that stay overnight are highest spending visitor segment.
- Continue to focus on larger nearby markets within driving distance and in other Western states (notably California) as the advertising budget allows.

Note: See type of activity summary for activity descriptions (slide 63)

Purposes/primary objectives of research

Brand/History

Utah Office of Tourism

UTAH LIFE ELEVATED

- 5th Report for Utah
- Continuous online data collection via TravelTrakAmerica nationwide syndication

Visitor Type

Visitors to the State of Utah – type and purpose of trips:

- Overnight
- Day
- Business
- Leisure
- Residents
- Non-residents

Profile

Characteristics:

- Visitor source - residence: State and DMA
- Demographics - age, children, income
- Trip - spending, length of stay, activities, quarterly trends
- Transportation mode
- Competitor (Colorado, Arizona, Idaho, Wyoming, Montana, Nevada) snapshot comparisons

Benefits

Balance of Trade:

- Export/Import spending (non-UT residents spending in UT vs. UT residents traveling elsewhere)
- “Domestic spending” (UT residents vacationing within the state)
- Most lucrative niche targets (derived from activities)

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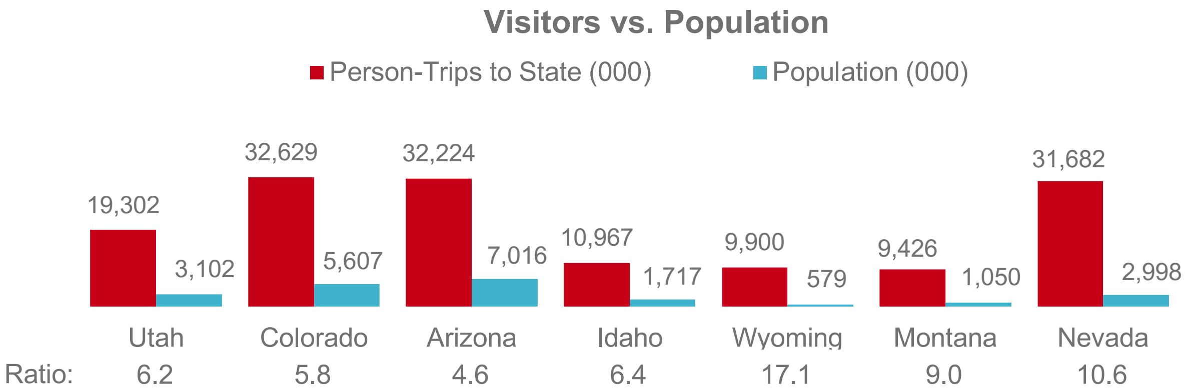
Executive Summary

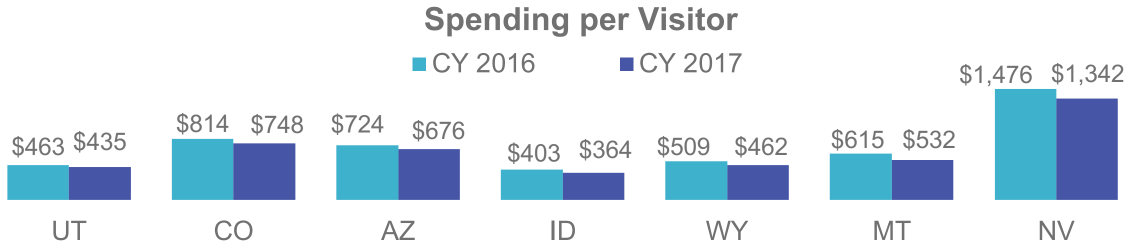
Tourism remains a leading export for Utah

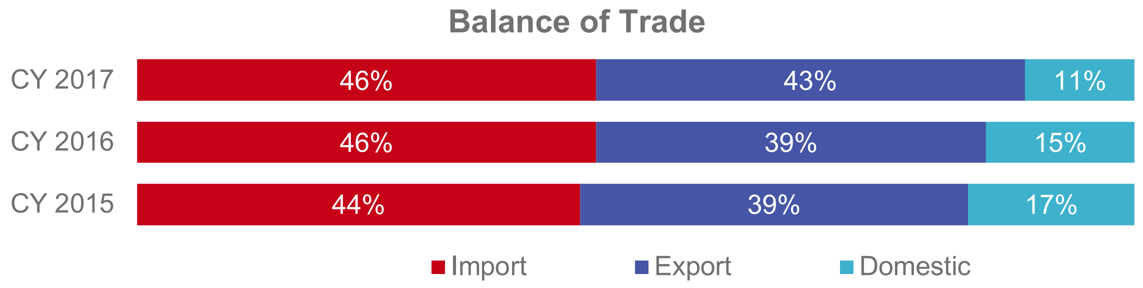
- Tourism introduces far reaching impacts; not simply in direct revenue to industry businesses, but in taxes (sales/lodging/etc.). The ratio of "Visitors per person" helps to show the relevance of tourism to Utah. With 6.2 visitors per resident, places Utah 5th among the competitive 7 states in region (notably, Wyoming and Montana get a lift from Yellowstone National Park; Nevada from gaming).

- All competitive States saw slight declines from the previous year; Utah visitor spending remains ahead of Idaho and similar to Wyoming.

- Utah's "balance-of-trade" remains unchanged, continuing to sell Utah to enough in- and out-of-state visitors to exceed the amount that residents spend by traveling elsewhere (import). The "export" and "domestic" spending suggests that Utah continues to position its features as a place to spend leisure/vacation time and $$$, but has room for improvement.







Import represents $ leaving UT
Export represents $ coming into UT
Domestic represents $ staying in UT

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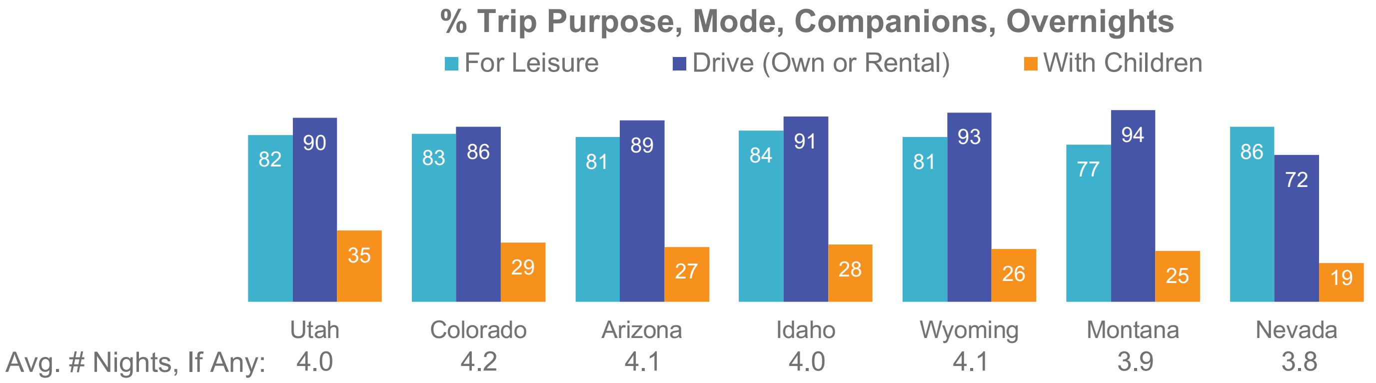
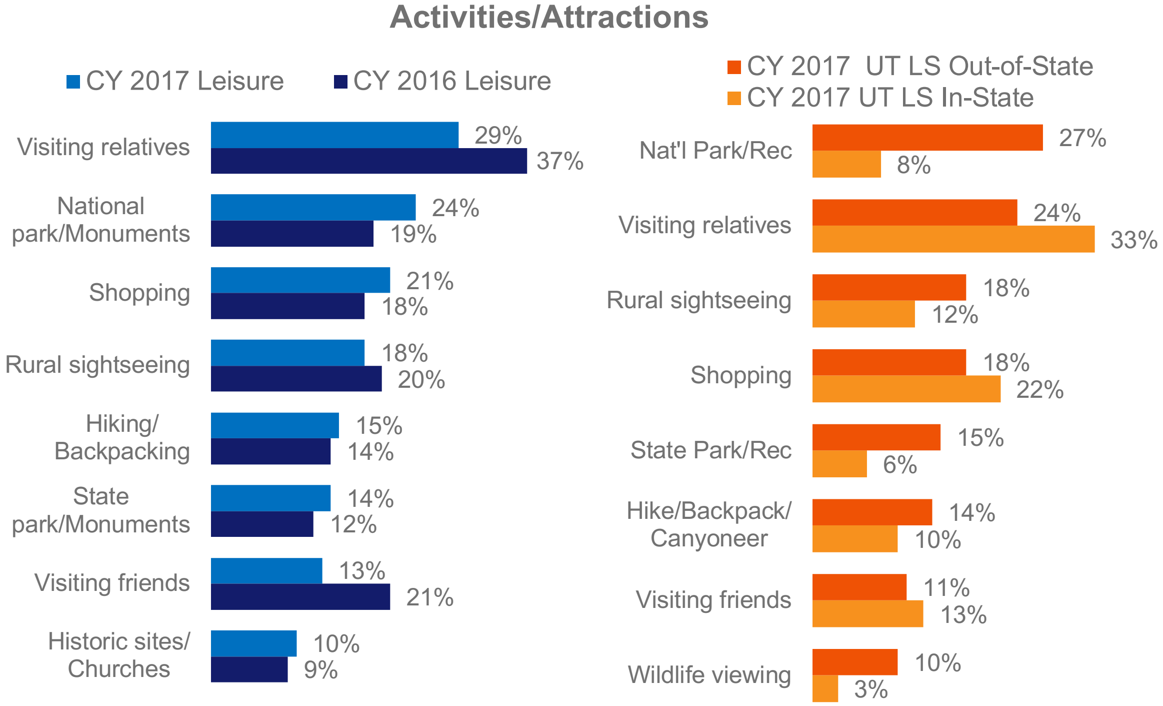
Why visitors come to Utah

- Leisure travelers dominate Utah's visitor industry, responsible for four out of five travelers. Nearly all visitors drive and the average stay lasts roughly 4.0 nights. Other States in region have similar profiles.
- In contrast to other competitors, Nevada visitors, aided by Las Vegas, are more likely to fly and fewer bring children.
- CY 2017 saw an increase in National Park, State Park, and Hiking activities. Declines were seen in visiting relatives and friends.
- More out-of-state visitors continue to take advantage of Utah's many outdoor features – especially sightseeing, visiting parks (both state and national), and visiting historic sites.



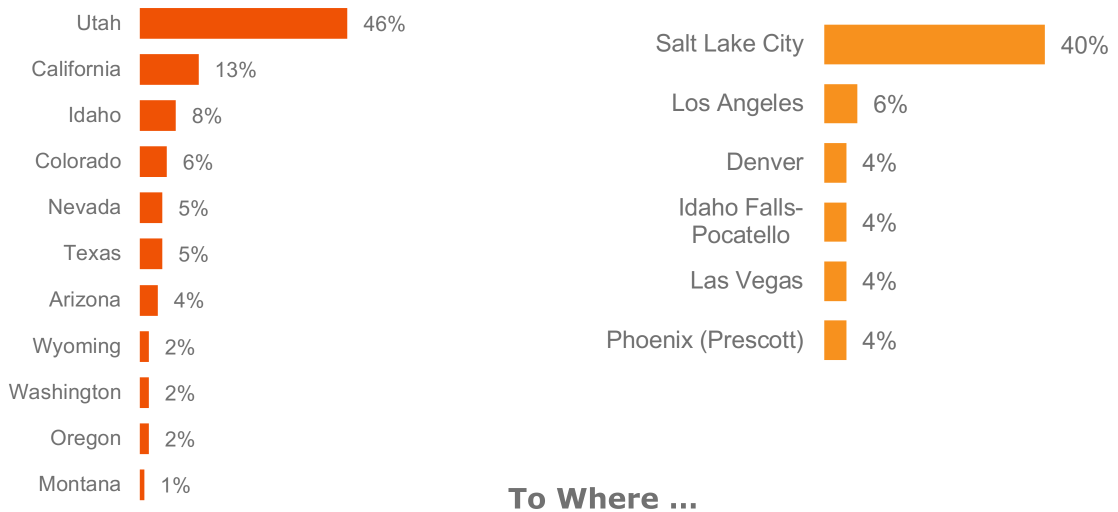


From where they come … to where they go
(CY 2017)

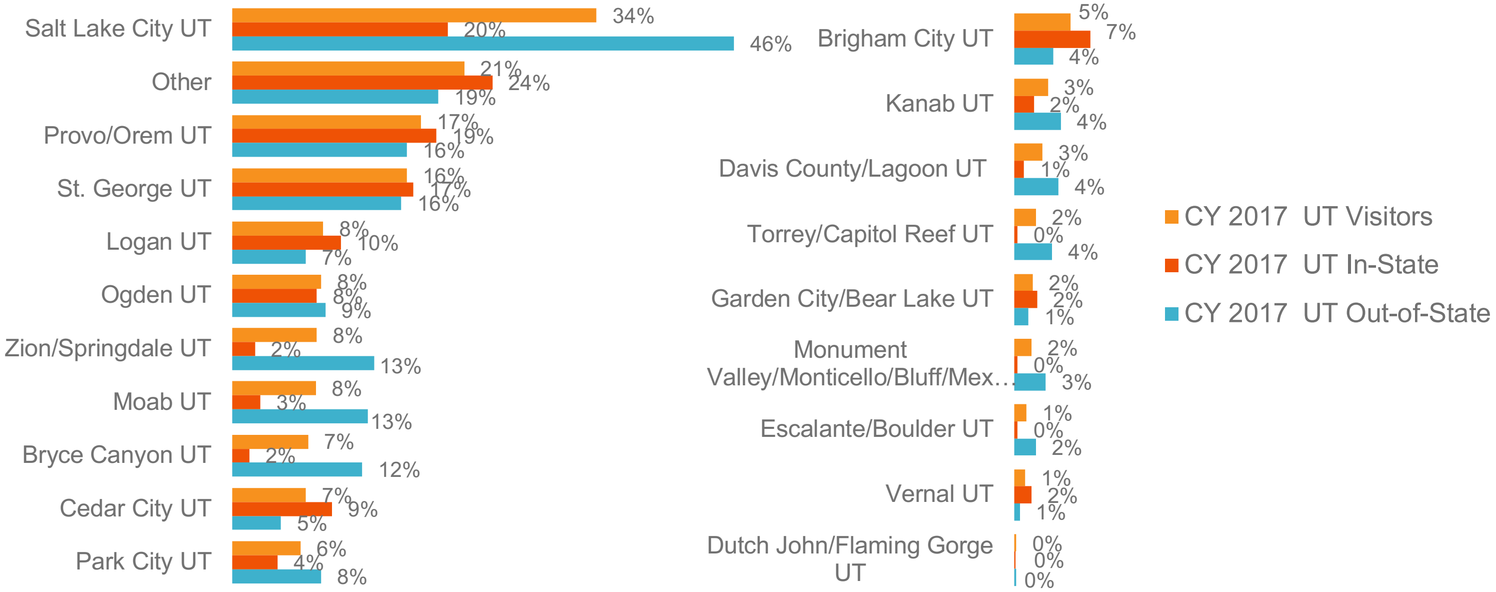
- Utah primarily draws visitors from within its borders and from nearby states: California, Colorado, Idaho, Nevada, Arizona, and Montana. However, unlike many destinations, the key source markets do not always border Utah (most notably, California).

- Visitors flock to the largest Utah cities, regardless of where they live. However, some differences appear by residence, with out-of-state visitors tending to include trips to Salt Lake City, Moab, Zion, Park City, Bryce Canyon, Kanab, Davis County, and Monument Valley than in-state visitors.

From Where …

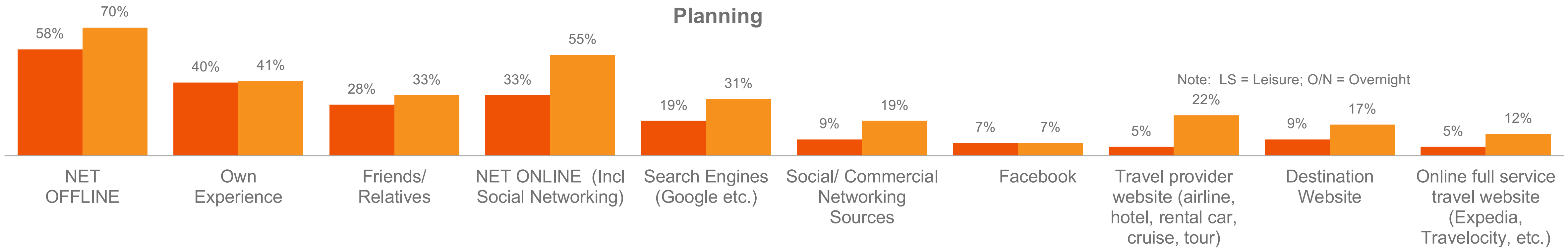


To Where …



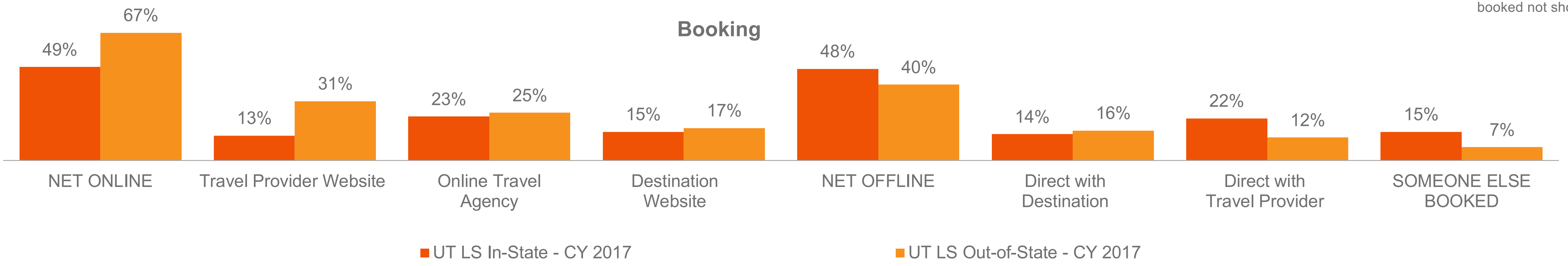
Utah visitors continue to rely on their own experience and friends/ relatives to plan; they usually book online

- Out-of-state visitors' online usage far exceeds that of in-state visitors for planning.



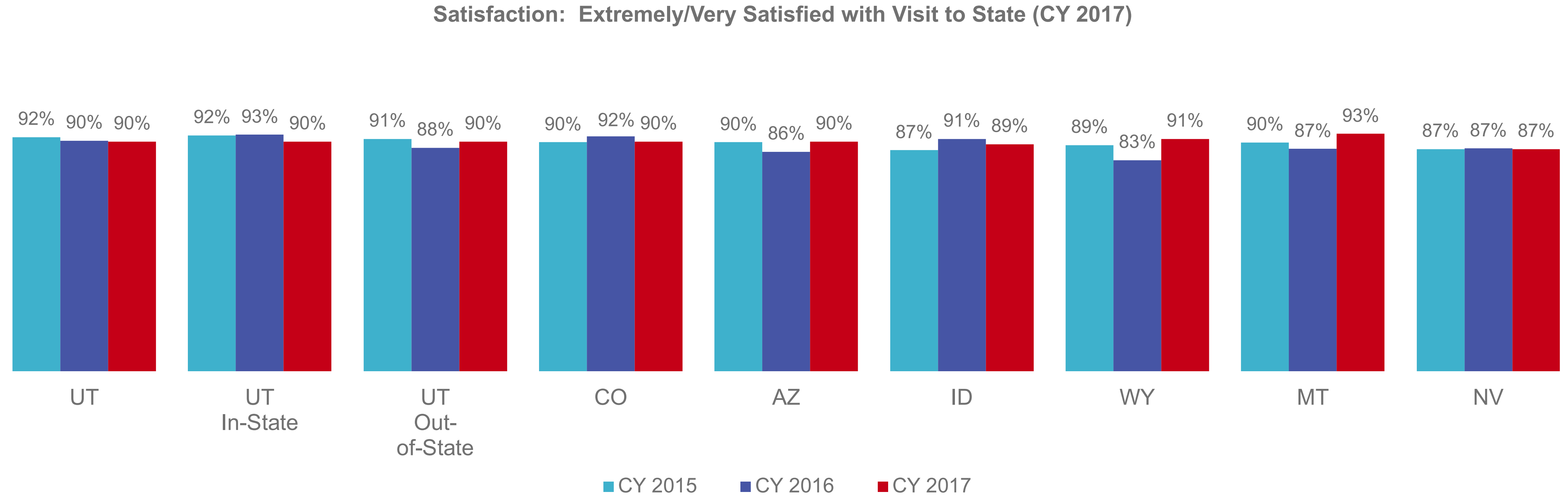
- In-state residents are more inclined than out-of-staters to book directly with the provider offline or with the destination (either online or offline).

Those not booking/ someone else booked not shown



Utah sends visitors home happy

Nine out of ten Utah visitors are happy with their experience, in-line with competing States in region; the exception being with Nevada which remains slightly lower than States in the competitive set.



Sizing and revenue by Utah visitors' selected activities

- **Entertainment** (shopping/dining/amusement parks, etc.) ranks **first** in generated revenue although it leads in neither participation nor spending levels

- **Adventure Sports** and **Sports & Recreation**, enthusiasts spend the most and are an emerging share of revenue.

- **Family/reunions** is the largest visitor participation of any niche, although spending the least of any group. In terms of share of visitor revenue, however it is tied with **Sports & Recreation** (a much higher spending category).

- Other categories, **Sightseeing, Parks/Gardens, Nature,** and **Arts/culture;** are also significant sources of wealth – collectively responsible for nearly half of the share of visitor spending.

	% Active in Each Type	Average Spend	Average Age	% of Revenue
Family Activities/Reunion	35%	$402	42	9%
Entertainment/Amusement	30%	$988	43	20%
Parks and Gardens	25%	$810	48	13%
Sightseeing	23%	$856	45	13%
Nature/Outdoor Activities	23%	$716	45	11%
Art & Culture	22%	$722	42	10%
Adventure Sports	17%	$1,334	42	15%
Sports and Recreation	12%	$1,106	43	9%

*Note: Visitors can participate in multiple activities (or none).

*See glossary for activities describing each niche (slide 69)

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Appendix: Detailed Results

4
Share of Visitors

Utah hosts over 19 million visitors annually

Person-trips; trips = 50+ miles from home (one-way) or spent 1+ nights away

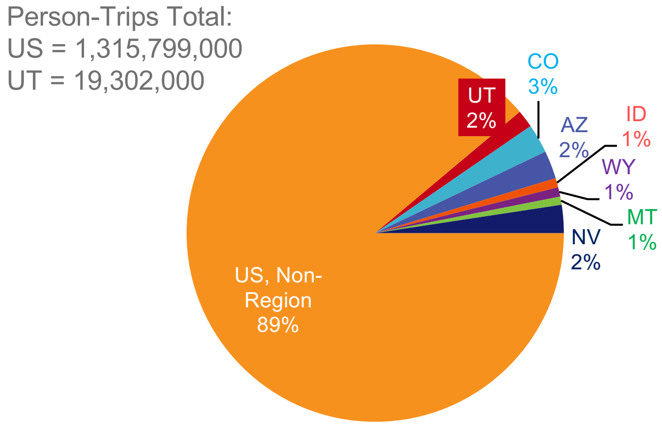
Market Overview:

- Utah visitors make up 2 percent of total US travel.
- Examining "visitors vs. residents"; Utah attracts 19 million total visitors, indicating tourism and business travel provides substantial revenue to the State.

Travel and Tourism Impact

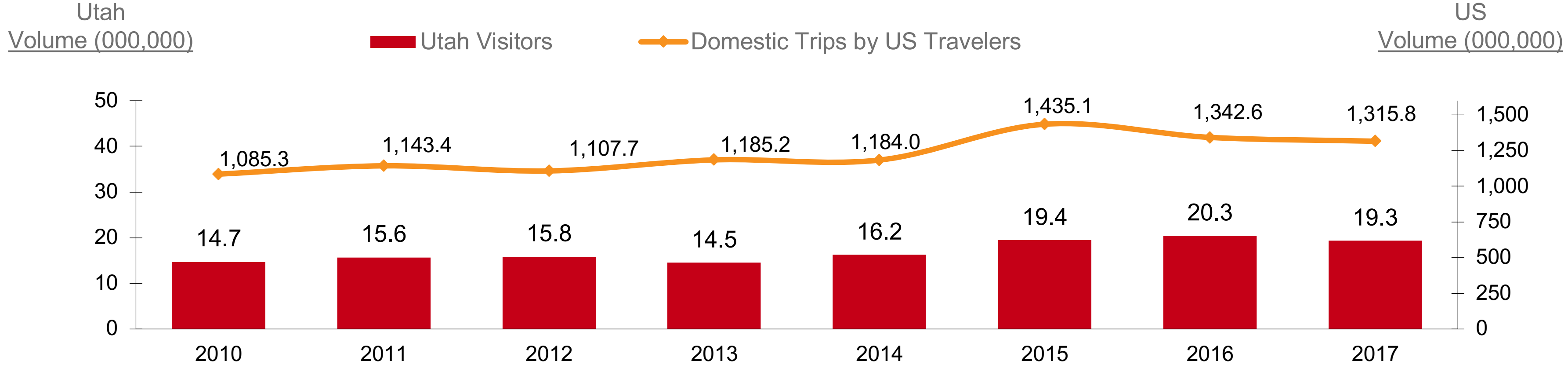
Population - Census (2017 est.) US / Utah	Number of US Visitors to Utah
325,719,178 / 3,101,833	19,302,000

Visitation – % of Person-Trips: Seven States



Market History:

Travel and Tourism Impact



Q4a. Please indicate US state(s) visited; Q3b for households (projected)

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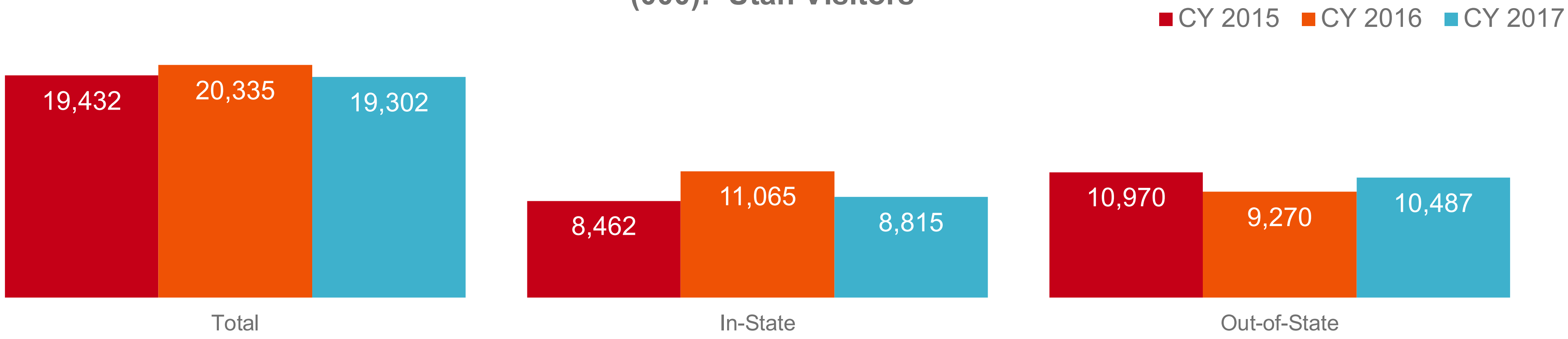
Visitor volume (person-trips) dipped slightly

(Trips = 50+ miles from home (one-way) or spent 1+ nights)

2016 was a banner year for visitor arrivals; overall traveler counts dipped although the important "Out-of-State" market has grown.

Visitation – Person-Trips (000): Utah Visitors



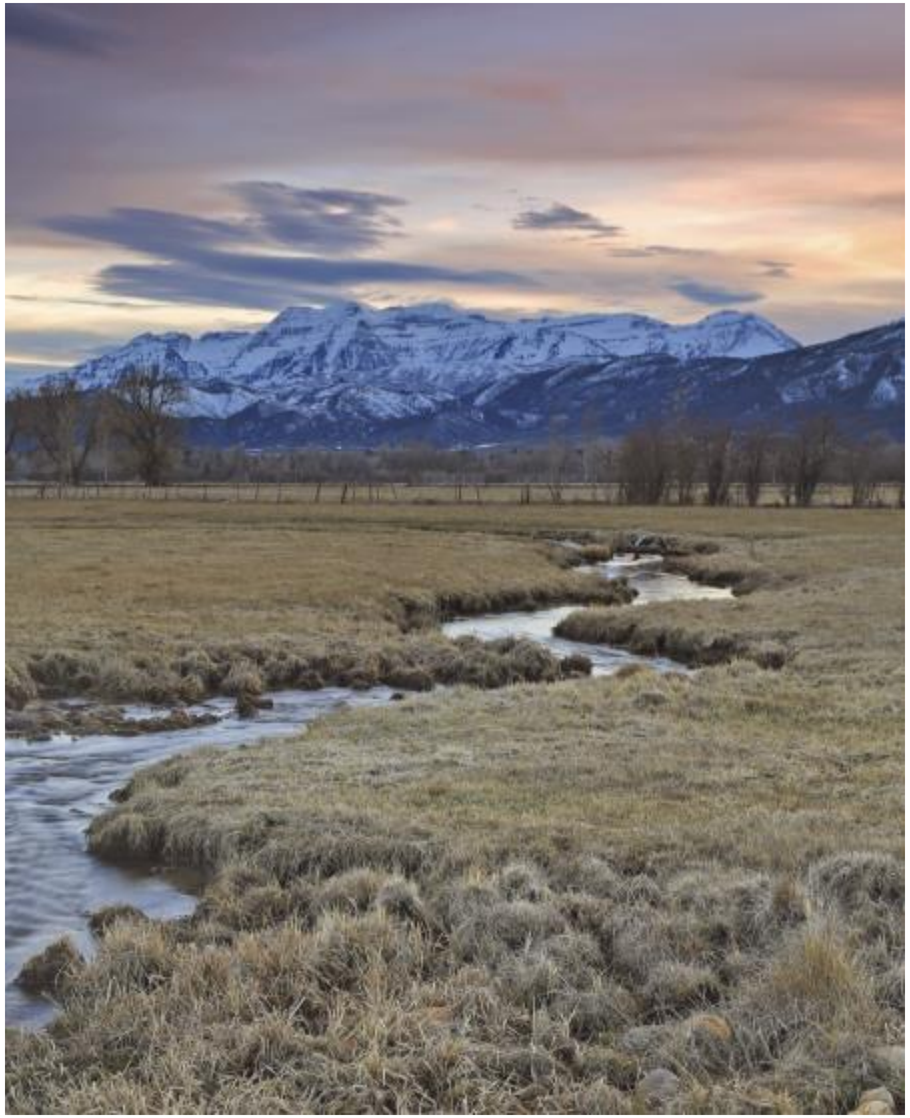
	Total			In-State			Out-of-State		
Leisure:	15,118	15,658	16,732	6,223	8,266	7,776	8,859	7,351	8,955
Business:	1,166	1,728	1,177	405	741	396	748	954	780
Unclassified:	3,148	2,949	1,393	1,834	2,058	683	1,365	965	752

Leisure:	(78%)	(77%)	(87%)	(74%)	(75%)	(88%)	(81%)	(79%)	(85%)
Business:	(6%)	(9%)	(6%)	(5%)	(7%)	(4%)	(7%)	(10%)	(7%)
Unclassified:	(16%)	(15%)	(7%)	(22%)	(19%)	(8%)	(12%)	(10%)	(8%)

Q4a. Please indicate US state(s) visited

Note: A rather small business sample (16 in-state; 23 out-of-state) contributes to volatility

5
Trip Purpose/Source of Visits/Timing

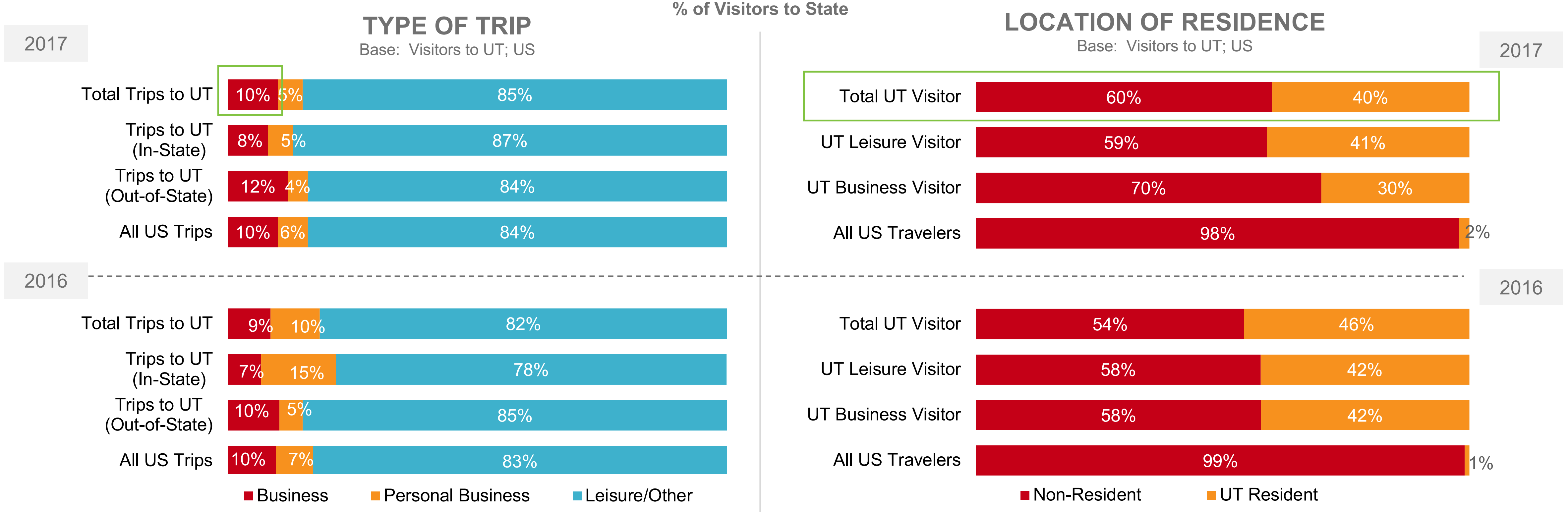


Over four-out-of-five come to Utah for leisure

- Leisure travelers dominate all traveler segments to Utah, although a growing one-in-ten arrive for business.
- A majority of leisure travelers are Non-Utah residents while two out of three business visitors arrive from outside of Utah.

Trip/Visitor Characteristics

% of Visitors to State



Q4a. Please indicate US state(s) visited
Q1B. Please select the primary purpose for trips in the month of ...? (Household Trip Level – demo wtd)

Panel: Residence of visitors (Household Level)

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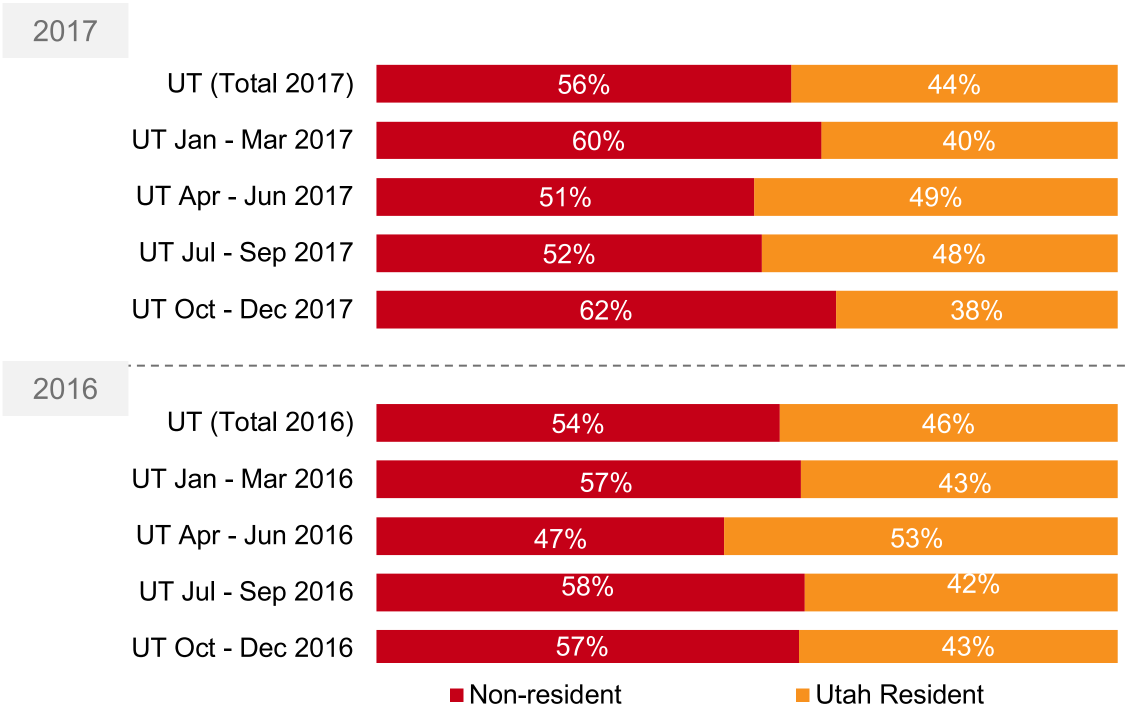
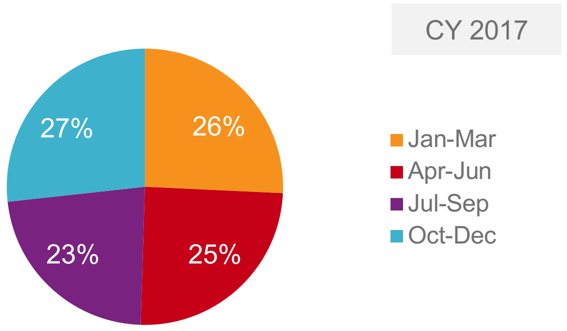
Traveler volumes are steady throughout the year

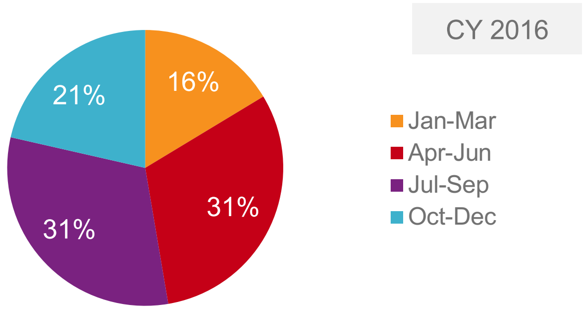
(23-27 percent per quarter)

SOURCE of Utah VISITORS by QUARTER

Base: Utah Visitors





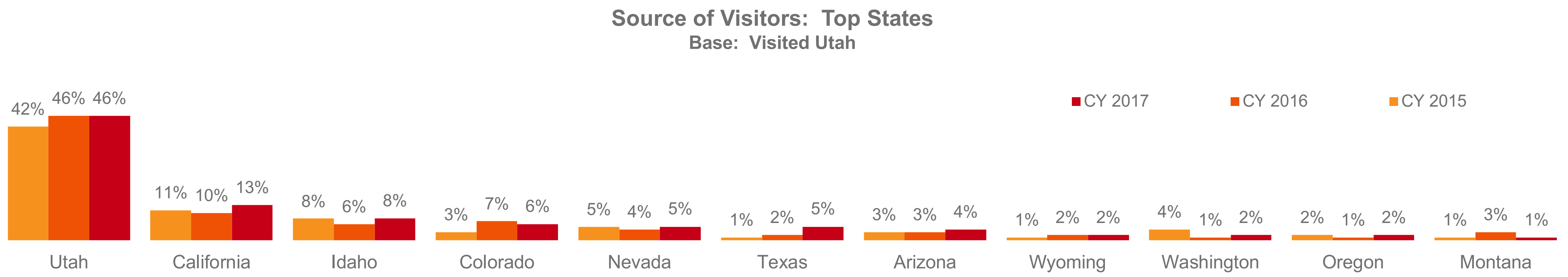


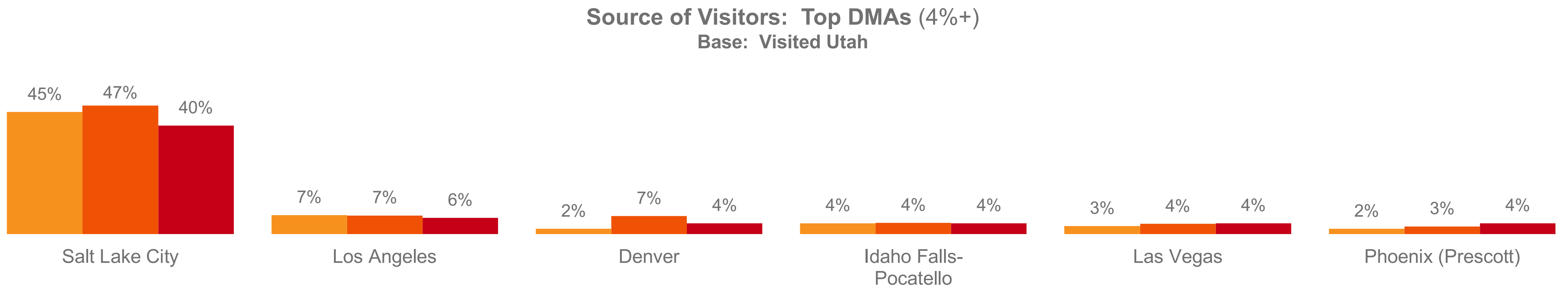
Panel: State/DMA residence of those who visited Utah (Household Level)

Q4a. Please indicate the US state(s) visited . . . (Person Trips Projected at Trip Level)

The largest share of out-of-state visitors come from CA

- Rocky Mountain and Pacific, states and cities, continue to provide the bulk of travelers to Utah.





Panel: State/DMA residence of those who visited Utah (Household Level)

Note: SLC DMA extends beyond Utah boundaries

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Planning and Booking

Unsurprisingly, out-of-State visitors required the longest trip planning timelines, a nearly half took over 3 months to plan their trip.

Trip Planning (Time Before Visit)	All US Travelers (All Trips) CY 2017	UT Visitors Total CY 2015	UT Visitors Total CY 2016	UT Visitors Total CY 2017	UT Visitors Leisure O/N* CY 2017	UT Visitors Leisure Day Trip CY 2017	UT In-State Visitors CY 2017	UT Out-of-State Visitors CY 2017
Considered								
Within Two Weeks	30%	25%	30%	25%	20%	41%	37%	20%
2 – 4 Weeks	16	13	13	16	14	15	21	13
1 – 3 Months	19	15	16	18	19	18	15	20
3+ Months	35	47	41	41	47	26	27	47
Decided								
Within Two Weeks	38	32	38	35	28	52	49	28
2 – 4 Weeks	17	15	16	16	15	18	20	14
1 – 3 Months	19	18	17	17	19	12	13	19
3+ Months	26	35	29	32	38	18	18	39

Q4i. Please indicate how far in advance you considered traveling to . . . // Decided to visit . . . (State Level-demo wtd)

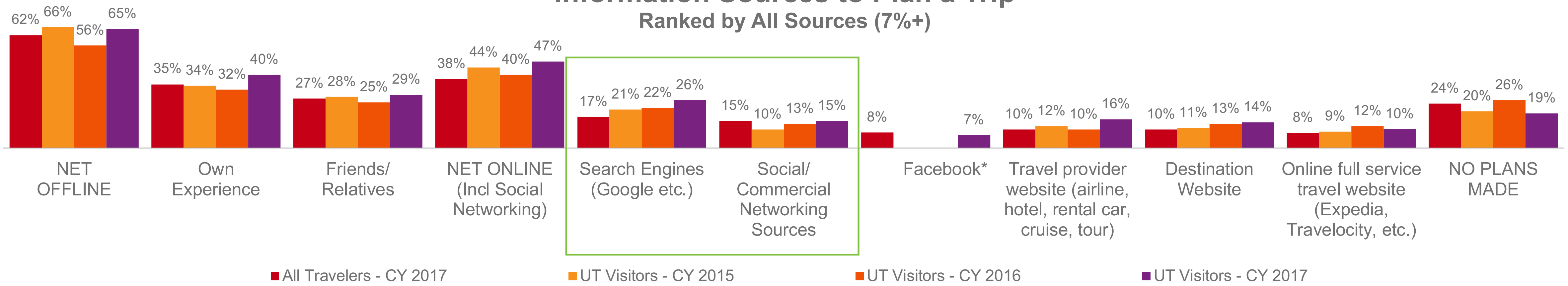
*O/N = Overnight

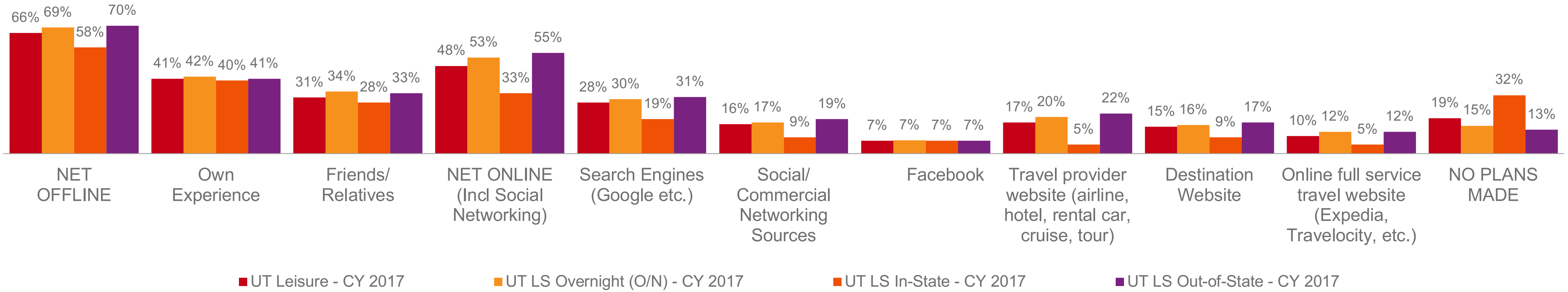
Online resources surge in trip planning, particularly among those from Out-of-State

- Although ‘own experience’ and ‘friends/relatives’ remain the prominent information sources; online resources are emerging as important information sources; increasing every year for the past three years.

Information Sources to Plan a Trip

Ranked by All Sources (7%+)





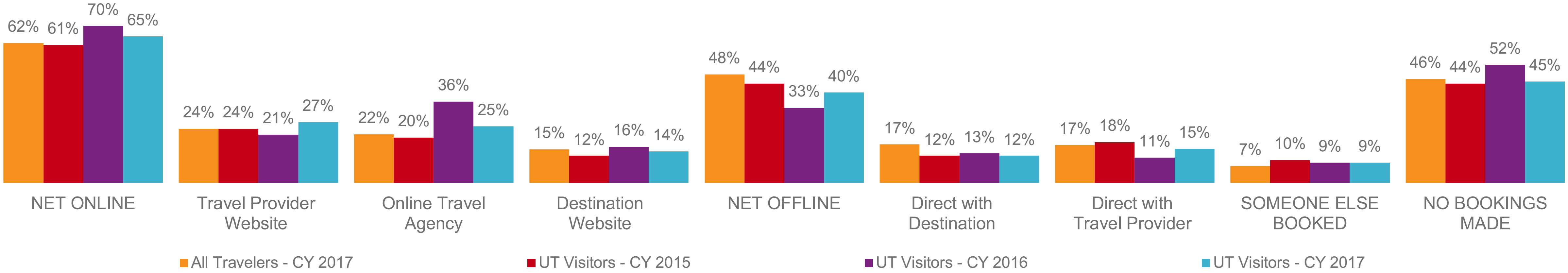
Note: Social/Comm’l Network = Facebook, LinkedIn, Twitter, etc.
* Facebook was broken out in 2017 only

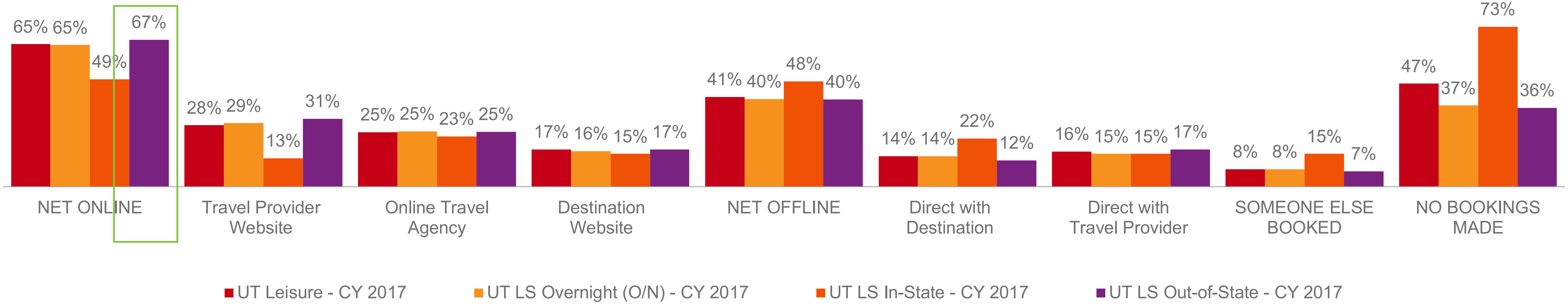
LS = Leisure
O/N = Overnight

Q4j. What sources did you use in planning your trip to . . . (State Level – demo wtd)

Out-of-State travelers rely heavily on Online resources compared to other travelers

Method Used to Book Trip Components
Ranked by All Sources (7%+)



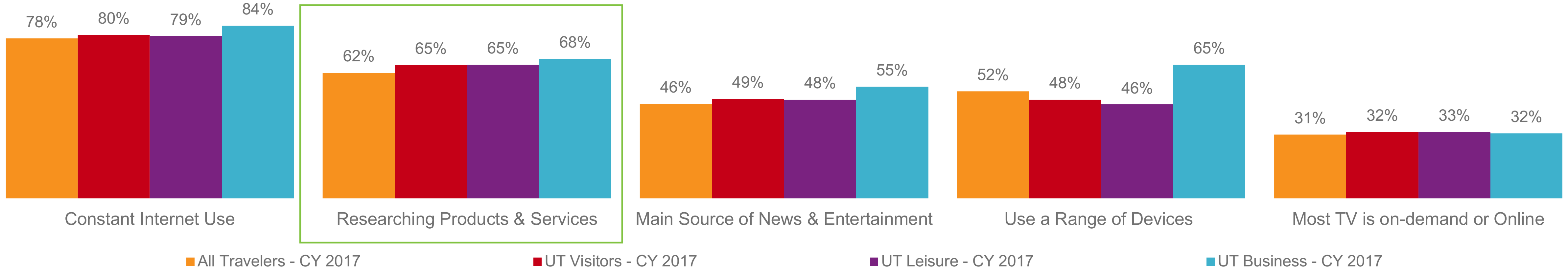


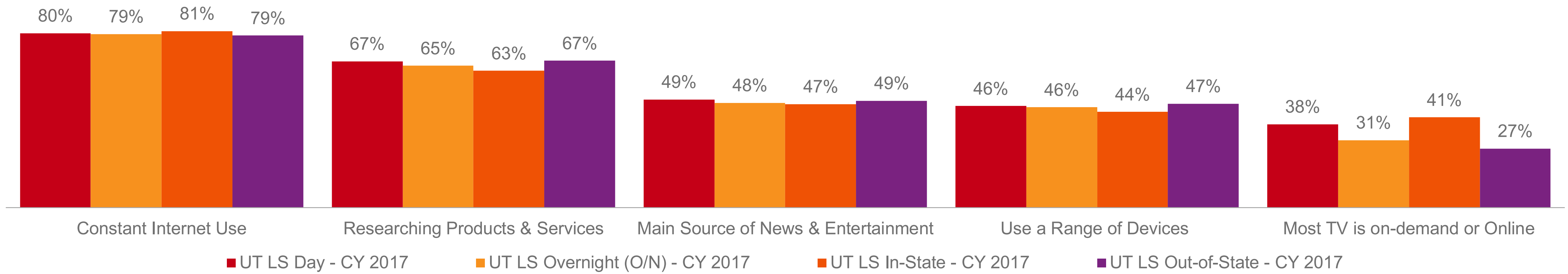
Q4k. Please indicate the method(s) you used to book your trip . . . (State Level – demo wtd)

Note: LS = Leisure O/N = Overnight

Utah Traveler Perceptions of the Internet

- Most travelers (All domestic and Utah) rely heavily on the internet in their daily lives. On-demand/Online TV is a notable exception.
- Internet usage is similar across groups – with the exception of business travelers who tend to rely more on it.
- Two out of three Utah visitors rely on online sources for researching products and services, a bit more than the national average.



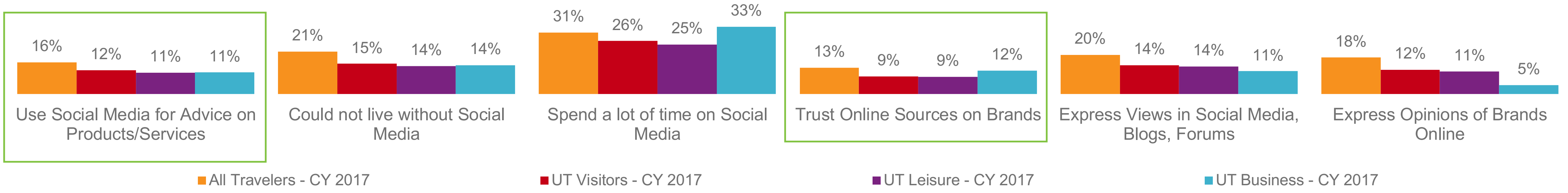


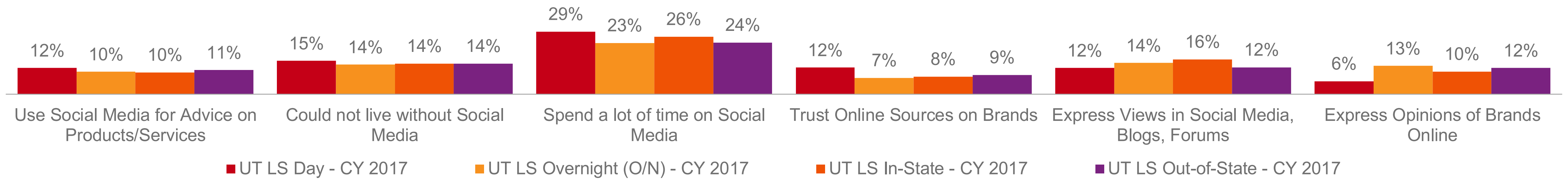
QF1. How important is the internet to you?. (State Level – demo wtd)

Note: LS = Leisure O/N = Overnight

Utah Traveler Perceptions of Social Media

- Although many travelers spend a lot of time on social media, a lower percentage turn to social media for advice and opinions on brands, products, and services.
- Also, around one-in-ten Utah visitors use or trust online/social media sources for information on brands and products and services, slightly less than the national average in these areas.





QF2. How important is social media to you? (State Level – demo wtd)

Note: LS = Leisure O/N = Overnight

7

Trip Characteristics

Although most come to visit friends/relatives, a growing share come to experience the outdoors

- Out-of-state visitors spend an extra day in Utah (4.1 vs. 2.7 nights for in-staters).

Trip Choices (Trip Level)	All US Travelers CY2017	UT Visitors Total CY2015	UT Visitors Total CY2016	UT Visitors Total CY2017	UT Visitors Overnight (O/N) Leisure (LS)	UT Visitors Day Trip Leisure (LS)	UT Visitors In-State	UT Visitors Out-of-State
PRIMARY TRIP PURPOSE								
NET Leisure	81%	79%	77%	82%	100%	100%	84%	81%
Visit Friends/Relatives	44	43	40	43	55	39	45	42
Entertainment/Sightsee	14	13	12	12	14	18	11	13
Outdoor Recreation	9	11	12	17	20	24	20	16
Business	10	6	9	10	--	--	8	12
Personal Business/Other	6	15	15	8	--	--	8	7
PRIMARY MODE								
% Own Auto/Truck	75%	74%	76%	70%	67%	99%	91%	55%
% Air Travel	14	14	10	15	15	1	3	22

Lodging (State Level)	All US Travelers CY2017	UT Visitors Total CY2015	UT Visitors Total CY2016	UT Visitors Total CY2017	UT Visitors Overnight (O/N) Leisure (LS)	UT Visitors Day Trip Leisure (LS)	UT Visitors In-State	UT Visitors Out-of-State
AVG # NIGHTS (if any)	3.5	3.7	3.8	4.0	3.7	--	2.7	4.1
Private Home	1.2	1.7	1.3	1.3	1.6	--	1.3	1.5
Hotel/Motel	1.5	1.1	1.1	1.6	1.2	--	0.7	1.7
RV/Tent	0.1	0.4	0.6	0.5	0.3	--	0.3	0.3

Q1b: Which was the primary purpose of trip? Q2b: Which was the primary mode of transportation? (Trip Level – demo wtd)
Q4f: Please specify the number of nights stayed at each listed accommodation. (State Level – demo wtd)

Of competitors, UT visitors are similar in purpose and travel mode

- Nevada is an outlier among the regional States, visitors there are more likely to fly and less likely to go for outdoor activities.
- Trips to Utah are slightly shorter compared to competitors, but similar to US travelers overall (again with the exception of Nevada)

Trip Choices (Trip Level)	All US Travelers	Visit UT	Visit CO	Visit AZ	Visit ID	Visit WY	Visit MT	Visit NV
PRIMARY TRIP PURPOSE								
NET Leisure	81%	82%	83%	81%	84%	81%	77%	86%
Visit Friends/Relatives	44	43	38	41	42	33	33	22
Entertainment/Sightsee	14	12	13	13	11	21	12	31
Outdoor Recreation	9	17	19	13	17	15	17	6
Business	10	10	10	11	7	7	7	10
Personal Business/Other	6	8	7	8	9	12	16	4
PRIMARY MODE								
% Own Auto/Truck	75%	70%	62%	65%	73%	73%	76%	49%
% Air Travel	14	15	22	19	11	8	10	37

Lodging (State Level)	All US Travelers	Visit UT	Visit CO	Visit AZ	Visit ID	Visit WY	Visit MT	Visit NV
AVG # NIGHTS (if any)	3.5	4.0	4.2	4.1	4.0	4.1	3.9	3.8
Private Home	1.2	1.3	1.3	1.1	1.1	0.9	0.8	0.6
Hotel/Motel	1.5	1.6	1.6	1.7	1.6	1.8	1.9	2.4
RV/Tent	0.1	0.5	0.3	0.4	0.5	0.8	0.5	0.1

Q1b: Which was the primary purpose of trip? Q2b: Which was the primary mode of transportation? (Trip Level – demo wtd)
Q4f: Please specify the number of nights stayed at each listed accommodation. (State Level – demo wtd)

More likely to travel with children, Utah visitors travel in slightly larger groups

- Of **overnight leisure visitors,** in-staters are far more likely travel with kids than non-residents; the latter group most commonly travels in pairs
- Somewhat larger travel parties in Summer (Q3) and Winter (Q1) more likely include children, due to school vacations and holidays.

Trip Characteristics (Trip Level)	All US Travelers CY2017	UT Visitors Total CY2015	UT Visitors Total CY2016	UT Visitors Total CY2017	UT Visitors for Business	UT Visitors for Leisure (LS)	UT Visitors Overnight (O/N) LS	UT Visitors In-State	UT Visitors Out-of-State
AVG IN TRAVEL PARTY	2.6	3.0	2.8	3.0	2.0	3.2	3.1	3.4	2.7
% Travel in Pairs	41	43%	39%	38	27	41	42	30	43
% Travel w/ Children	28	34	33	35	13	38	37	43	30
Avg # Kids Inc. 0	0.5	0.8	0.7	0.8	0.2	0.9	0.8	1.2	0.6
Avg # Kids Exc. 0	1.9	2.2	2.2	2.3	1.4	2.4	2.3	2.7	1.9

Trip Characteristics (Trip Level)	All UT Visitors	Q1 Jan – Mar 2017	Q2 Apr – Jun 2017	Q3 Jul – Sep 2017	Q4 Oct – Dec 2017
AVERAGE # IN TRAVEL PARTY (Q3a)	3.0	3.0	3.0	2.8	3.2
% Travel in Pairs	38	33	45	37	36
% Traveling with Children	35	39	32	34	36
Avg. # of Children on Trip Inc. Zero	0.8	0.9	0.7	0.7	0.9
Avg. # of Children on Trip Exc. Zero	2.3	2.3	2.2	2.1	2.6

Q3a: Please indicate number of travel party members (including yourself) under 18 and 18+. (Trip Level-demo wtd)

Among competitors, Utah has the largest travel parties, due to the inclusion of children

Trip Characteristics (Trip Level)	All US Travelers	Visit UT	Visit CO	Visit AZ	Visit ID	Visit WY	Visit MT	Visit NV
AVERAGE # IN TRAVEL PARTY	2.6	3.0	2.6	2.6	2.8	2.9	2.6	2.6
% Travel in Pairs	41	38	39	44	46	47	45	47
% Traveling with Children	28	35	29	27	28	26	25	19
Avg. # of Children on Trip Inc. 0	0.5	0.8	0.5	0.5	0.5	0.5	0.5	0.4
Avg. # of Children on Trip Exc. 0	1.9	2.3	1.8	2.0	1.9	2.0	1.9	1.9

Q3a: Please indicate number of travel party members (including yourself) under 18 and 18+. (Trip Level-demo wtd)

Shared Economy Lodging/Rentals and Rideshares

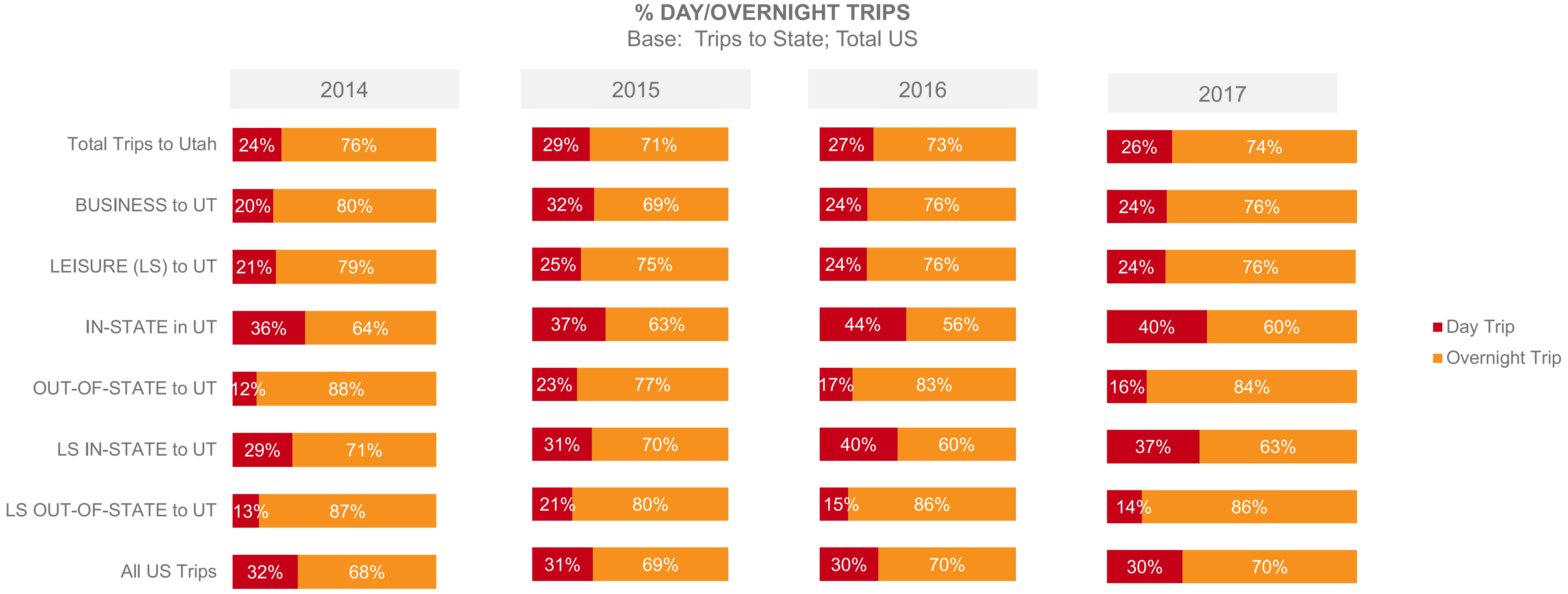
- A little over a quarter of all Utah visitors have ever used a shared economy lodging (Airbnb, etc.); proportions were consistent with all US travelers.
- Utah visitors, however, were less likely to use ride shares compared to US travelers at-large.

Shared Economy Lodging/Rental (past 12 months)	All US Travelers CY2017	UT Visitors Total CY2017	UT Visitors Overnight (O/N) Leisure (LS)	UT Visitors Day Trip Leisure (LS)	UT Visitors for Business	UT Visitors In-State	UT Visitors Out-of-State
NET: Leisure/Business Travel (% Yes)	28%	27%	30%	20%	17%	26%	28%
Leisure Travel	27%	26%	29%	20%	17%	25%	27%
Business Travel	4%	4%	3%	-	6%	3%	4%

Ride Share Usage (past 12 months)	All US Travelers CY2017	UT Visitors Total CY2017	UT Visitors Overnight (O/N) Leisure (LS)	UT Visitors Day Trip Leisure (LS)	UT Visitors for Business	UT Visitors In-State	UT Visitors Out-of-State
NET: Local, Leisure, Business Transportation	35%	25%	27%	11%	36%	29%	35%
Local Transportation	25%	15%	16%	7%	24%	17%	25%
Leisure Transportation	18%	13%	14%	5%	17%	15%	18%
Business Transportation	6%	5%	4%	1%	24%	5%	6%

Q32. Have you used the shared economy (AirBnB, VRBO, etc.) for accommodations for any trips in the past 12 months? (State Level – demo wtd)
Q34. Have you used the shared economy (Uber, Lyft, etc.) for transportation in the past 12 months? (State Level – demo wtd)

Overnight trips to Utah remains high helped by those from out-of-state



(Note: personal business and other are not classified as either business or leisure trips).

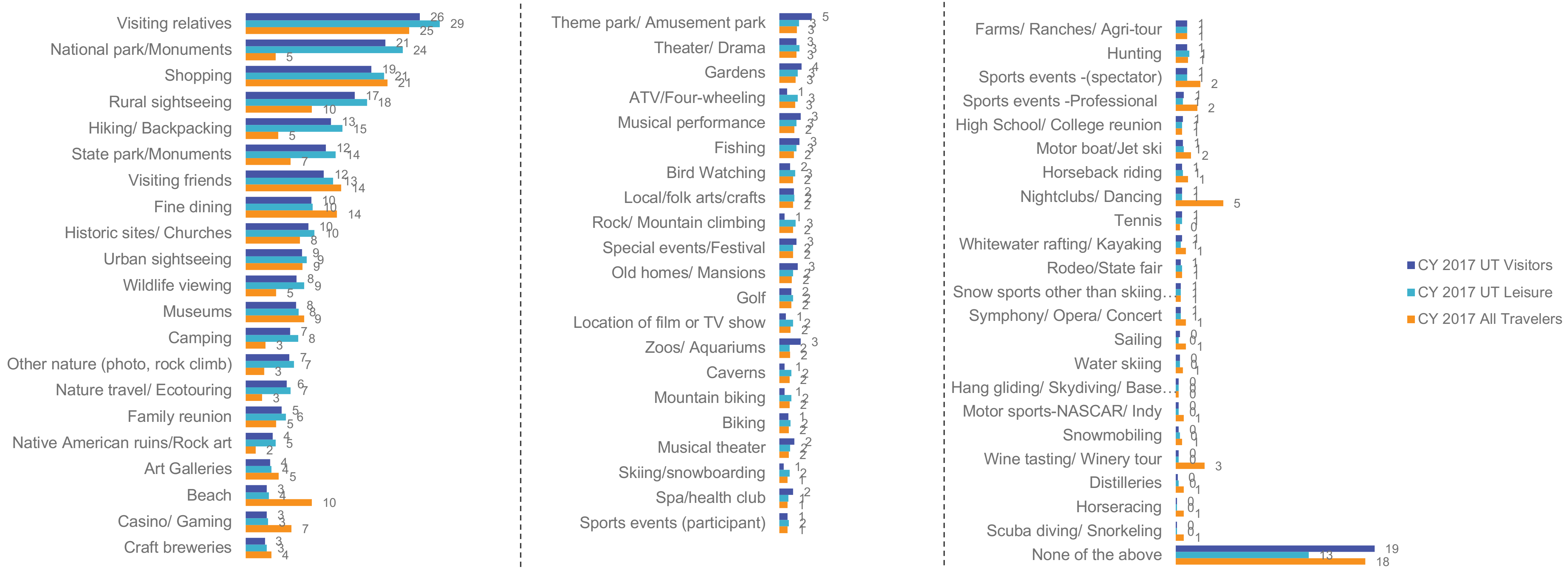
Q4e. Please specify which visits included at least one overnight stay . . . (State/Area Level-demo wtd)

More focused on outdoor features than US travelers …

- Utah visitors continue to place a stronger emphasis on: National and State parks, Hiking, Rural sightseeing, outdoor activities such as nature travel, photography, etc. and less on shopping, fine dining, beaches, and gaming.

CY 2017 % Activities Participated/Attractions

Ranked by 2017 Utah Visitors



Q4h. When you visited (state) during trip/ month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

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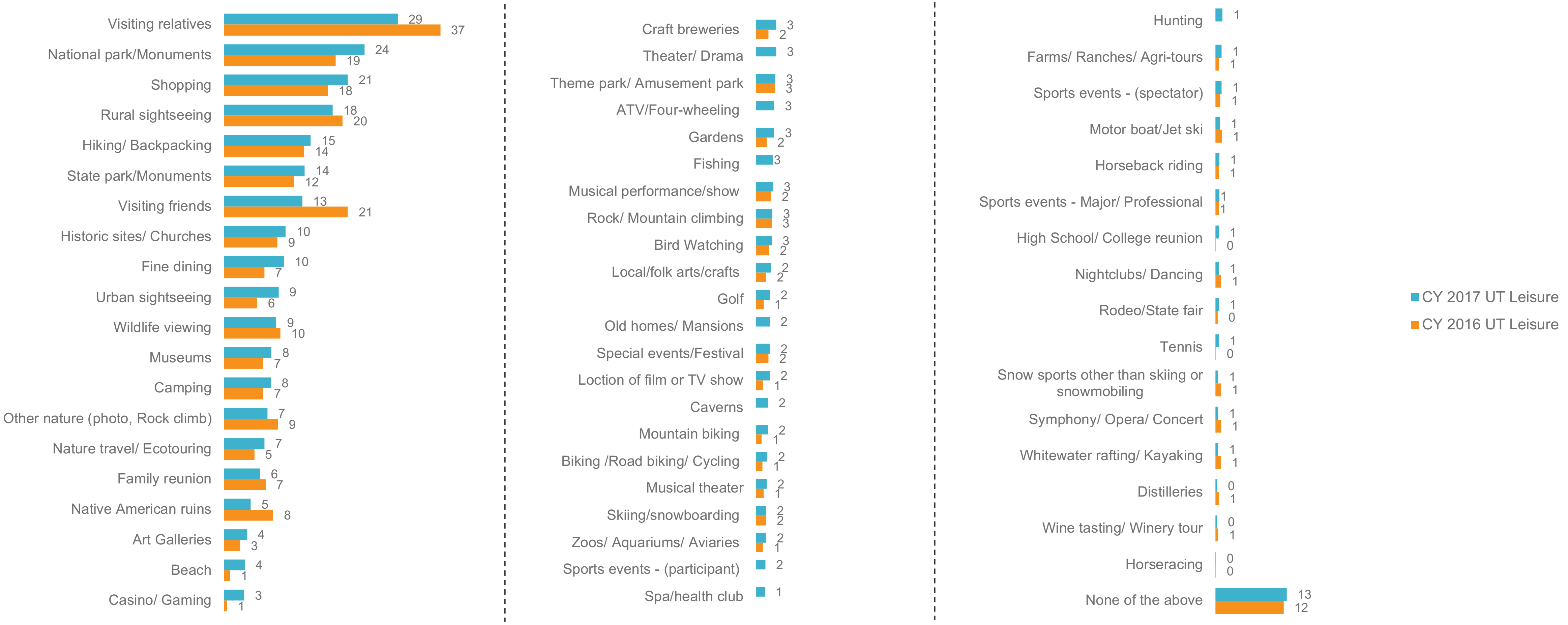
Travelers report a shift in visitor activities; more visits to National parks and camping and lower visits to friends/relatives

Trend: % Activities Participated/Attractions by Utah Leisure Visitors
Ranked by 2017 Total Utah Visitors



Q4h. When you visited (state) during trip/ month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

Out-of-staters far more often (boxes) choose Utah's outdoor recreational options and culture

Activities Participated/Attractions Visited by Leisure Visitors

% Participated/Visited – Ranked by 2017 Utah Out-of-State Visitors (>2%)

Note: LS = Leisure

Q4h. When you visited (state) during trip/ month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

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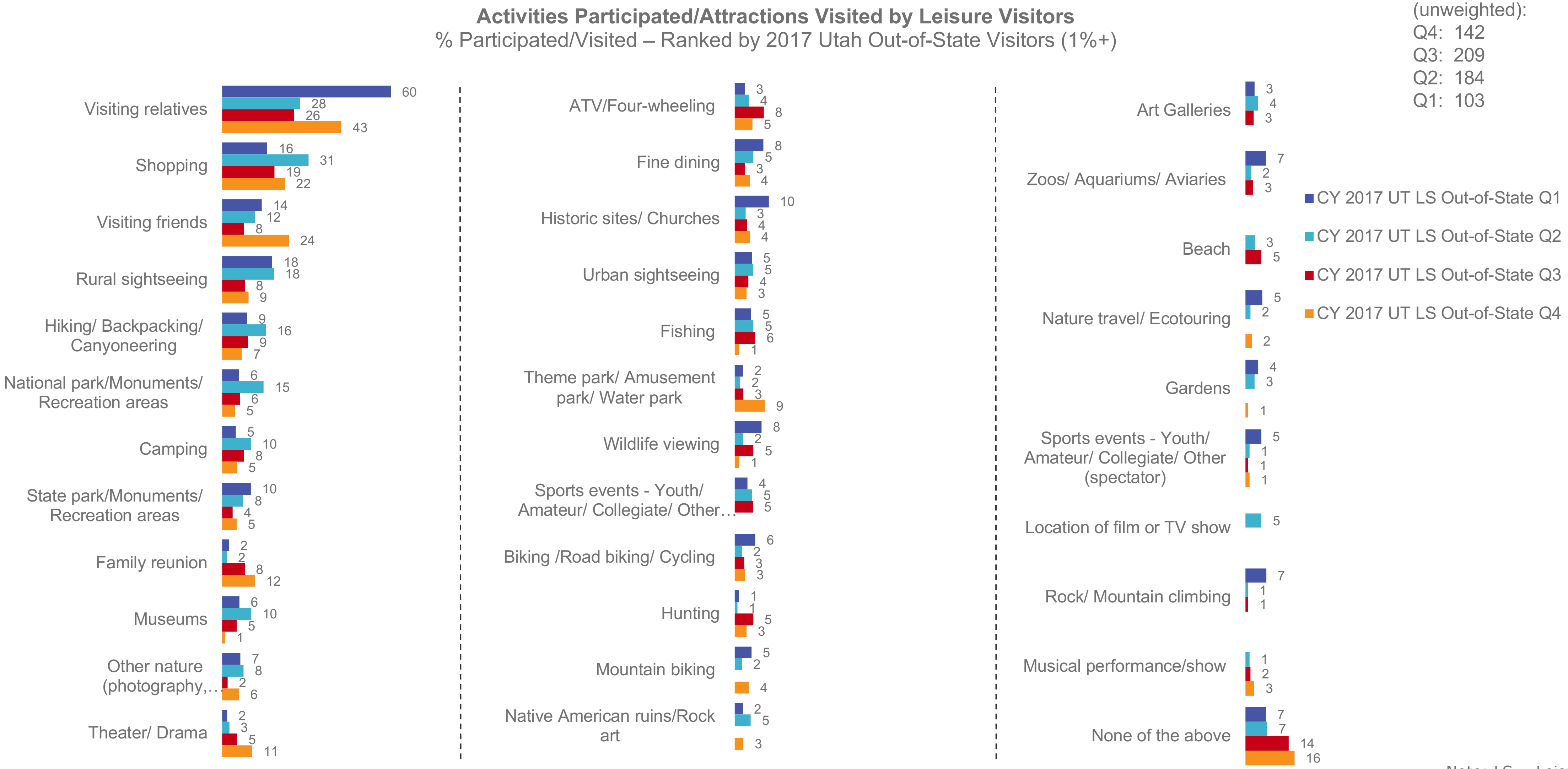
Out-of-state vacation activities/attractions by CY 2017 quarter

Sample by quarter (unweighted):
Q4: 142
Q3: 209
Q2: 184
Q1: 103



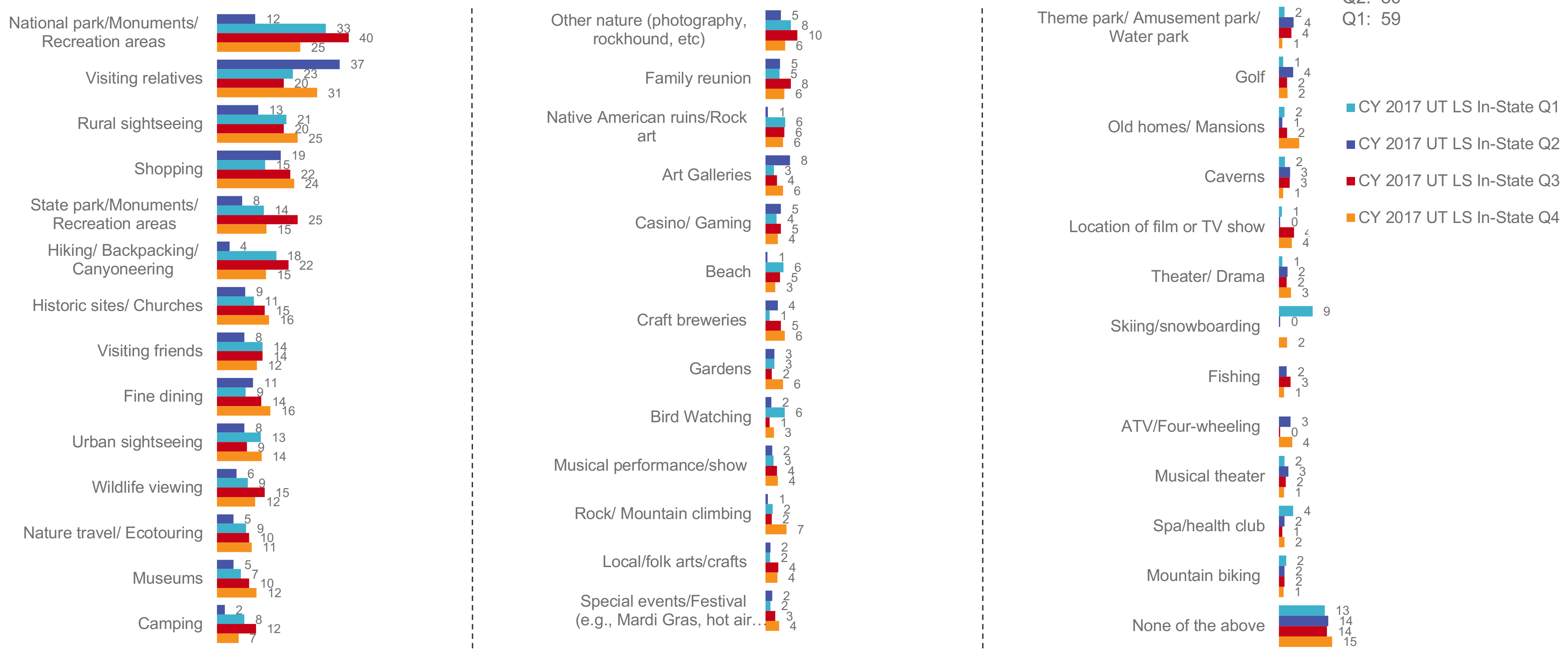
Q4h. When you visited (state) during trip/ month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

Note: LS = Leisure

In-state vacation activities/attractions by CY 2017 quarter

Sample by quarter (unweighted):
Q4: 71
Q3: 78
Q2: 86
Q1: 59

Activities Participated/Attractions Visited by Leisure Visitors
% Participated/Visited – Ranked by 2016 Utah In-State Visitors (1%+)

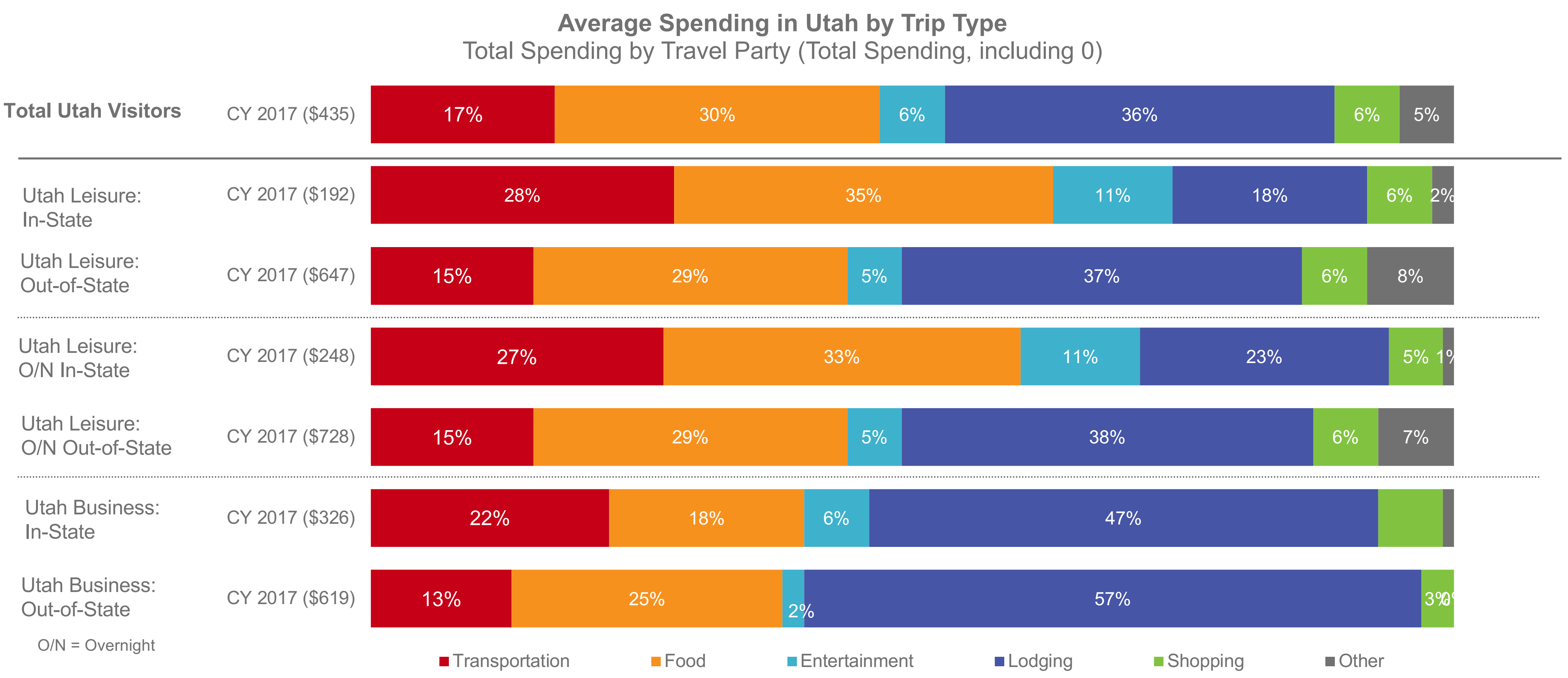


Note: LS = Leisure

Q4h. When you visited (state) during trip/ month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

Out-of-state visitors spend much more than residents

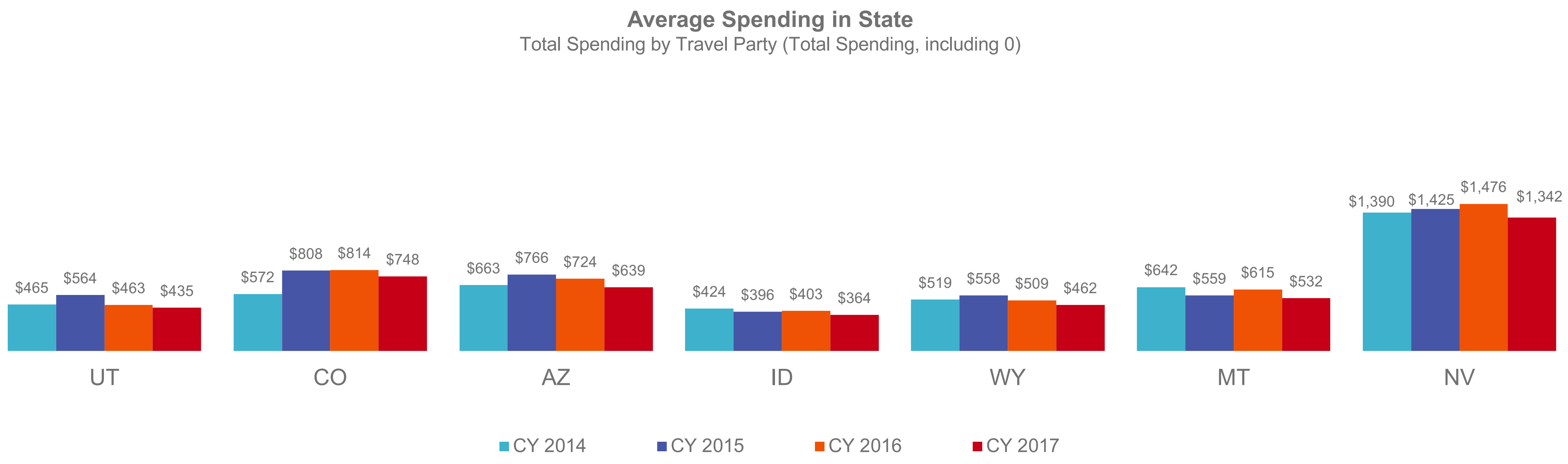
- The spending gap illustrates the value of enticing out-of-staters (who more likely stay overnight) to visit.



Note: Transportation includes parking/tolls. Food includes food/beverage/dining/groceries. Other includes amenities/other.
Q4g. Please indicate the total dollar amount spent by your travel party (all) in Utah for . . . (State Level-demo wtd)

Utah visitors spend amounts similar to nearby rural competitors

- Utah visitor spending exceeds only Idaho visitors; especially lagging spending in states with more urban activities available, such as Colorado, Arizona, and most notably, Nevada (with its gaming).
- Average spending was slightly down across the competitive set; noteworthy, lower spending is not in itself a cause for concern as it may be due to shifts in activities, profiles of travelers, or even discounts in prices.



Q4g. Please indicate the total dollar amount spent by your travel party (all) in (State) for . . . (State Level-demo wtd)
(Includes those not specifying leisure vs. business trips)

Wyoming adjusted for some outliers

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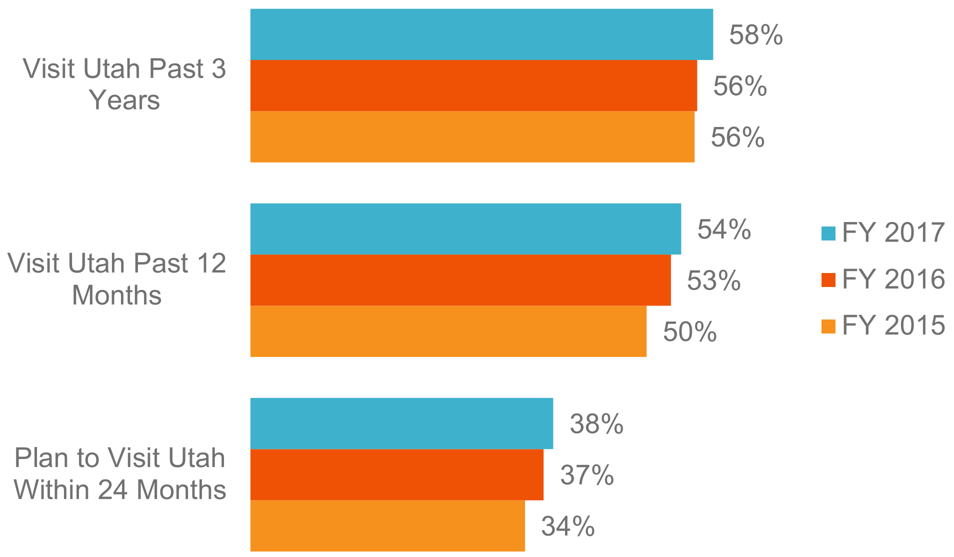
8
Competitive Environment

Utah draws a large share of visitors from within the State

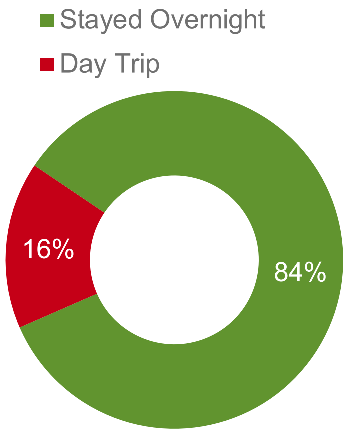
- A majority in-state travelers vacationed within Utah within the past three years
- Nearly two-in-five in-state travelers place Utah on their near-term future itinerary
- Nearly half of all non-resident visitors vacation frequently within the State (3 or more times within 5 years)

Visitation Patterns for Utah

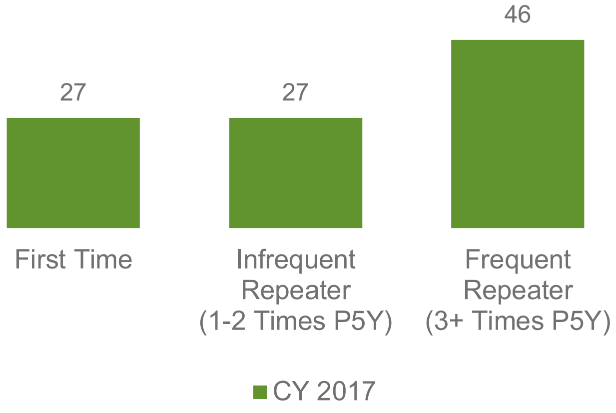
UTAH RESIDENT



NON-UTAH RESIDENT



OVERNIGHT NON-UTAH RESIDENT



Q7a: Please indicate US states visited for leisure in past three years.
Q7b. Please indicate states visited within the past 12 months.
Q7c: Which US states plan to visit within the next two years for leisure? (Household Level)

Q4E. Was this visit to Utah a first visit or repeat visit?
Q4E2: Have visited once or twice before in the past 5 years.
Q4E3: Have visited 3+ times in past 5 years.

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Salt Lake City ranks as the top Utah destination, especially for visitors from out-of-state

- While still the leading destination, by far, out-of-staters less likely include Salt Lake City than in the past.

Top Utah Destinations

% Utah Visitors Selecting Area (ranked by CY 2017)

All Utah Visitors	CY 2015	CY 2016	CY 2017	Utah Residents	CY 2015	CY 2016	CY 2017	Non-Utah Residents	CY 2015	CY 2016	CY 2017
Salt Lake City	36%	30%	37%	Salt Lake City	26%	25%	24%	Salt Lake City	45%	36%	46%
St. George	14	13	16	Provo/Orem	14	23	17	St. George	13	14	16
Provo/Orem	14	19	15	St. George	14	13	17	Zion/Springdale	13	14	13
Zion/Springdale	9	8	9	Logan	8	5	9	Provo/Orem	15	15	13
Logan	8	7	8	Ogden	5	9	8	Bryce Canyon	9	11	12
Moab	8	9	8	Cedar City	8	4	8	Moab	12	14	12
Bryce Canyon	6	7	8	Brigham City	5	3	6	Park City	12	10	9
Ogden	9	8	8	Park City	6	5	5	Logan	9	9	8
Park City	9	7	7	Garden City/Bear Lake	2	1	3	Ogden	12	6	7
Cedar City	8	7	6	Moab	4	5	3	Cedar City	7	9	4
Brigham City	5	4	4	Bryce Canyon	3	3	2	Kanab	2	4	4
Kanab	2	2	3	Zion/Springdale	4	3	2	Brigham City	5	4	4
Davis County/Lagoon	3	2	2	Davis County/Lagoon	3	2	2	Torrey/Capitol Reef	3	1	4
Torrey/Capitol Reef	3	2	2	Kanab	1	0	1	Monument Valley Area	5	5	3
Monument Valley Area	3	2	2	Vernal	2	2	1	Davis County/Lagoon	2	1	3
Escalante/Boulder	3	1	2	Torrey/Capitol Reef	3	2	1	Escalante/Boulder	4	2	3
Garden City/Bear Lake	1	1	2	Escalante/Boulder	2	0	0	Garden City/Bear Lake	0	1	1
Vernal	2	2	1	Monument Valley Area	1	0	0	Vernal	2	1	0
Dutch John/Flaming Gorge	1	1	0	Dutch John/Flaming Gorge	1	0	0	Dutch John/Flaming Gorge	1	2	0

Note: Respondents may select more than one destination (percentages may sum to more than 100%)
Q4d. Please indicate the cities/places visited in state . . . (State Level – demo wtd.)

Each state has a key city or two that attract the most visitors

Top Destinations within State
% Visitors Selecting Area (each state ranked)

UT Visitors	CY 2017	AZ Visitors	CY 2017	CO Visitors	CY 2017	ID Visitors	CY 2017	MT Visitors	CY 2017	NV Visitors	CY 2017	WY Visitors	CY 2017
Salt Lake City	37%	Phoenix	33%	Denver Area	43%	Boise Area	30%	Bozeman	17%	Las Vegas	73%	Yellowstone National Park	26%
St. George	16%	Flagstaff	16%	Colorado Springs	20%	Idaho Falls	18%	Missoula	17%	Reno/Sparks	10%	Cheyenne	25%
Provo/Orem	15%	Scottsdale	16%	Boulder	12%	Coeur d' Alene	14%	Great Falls	16%	Henderson	7%	Jackson Hole	19%
Zion/Springdale	9%	Tucson	14%	Fort Collins	8%	Pocatello	12%	Billings	16%	Lake Tahoe	7%	Casper	16%
Logan	8%	Grand Canyon	14%	Estes Park	8%	Twin Falls	12%	West Yellowstone	15%	Laughlin	6%	Jackson	14%
Moab	8%	Mesa	10%	Breckenridge	7%	Sandpoint	6%	Helena	11%	Boulder City	4%	Cody	13%
Bryce Canyon	8%	Sedona	10%	Aspen	5%	Lewiston	6%	Butte	10%	Carson City	4%	Sheridan	9%
Ogden	8%	Glendale	8%	Pueblo	5%	McCall	6%	Glacier National Park	10%	Mesquite	3%	Laramie	8%
Park City	7%	Tempe	7%	Grand Junction	5%	Post Falls	5%	Havre	5%	Pahrump	2%	Rock Springs	6%
Cedar City	6%	Prescott	6%	Durango	4%	Sun Valley	2%	Glendive	2%	Elko	2%		

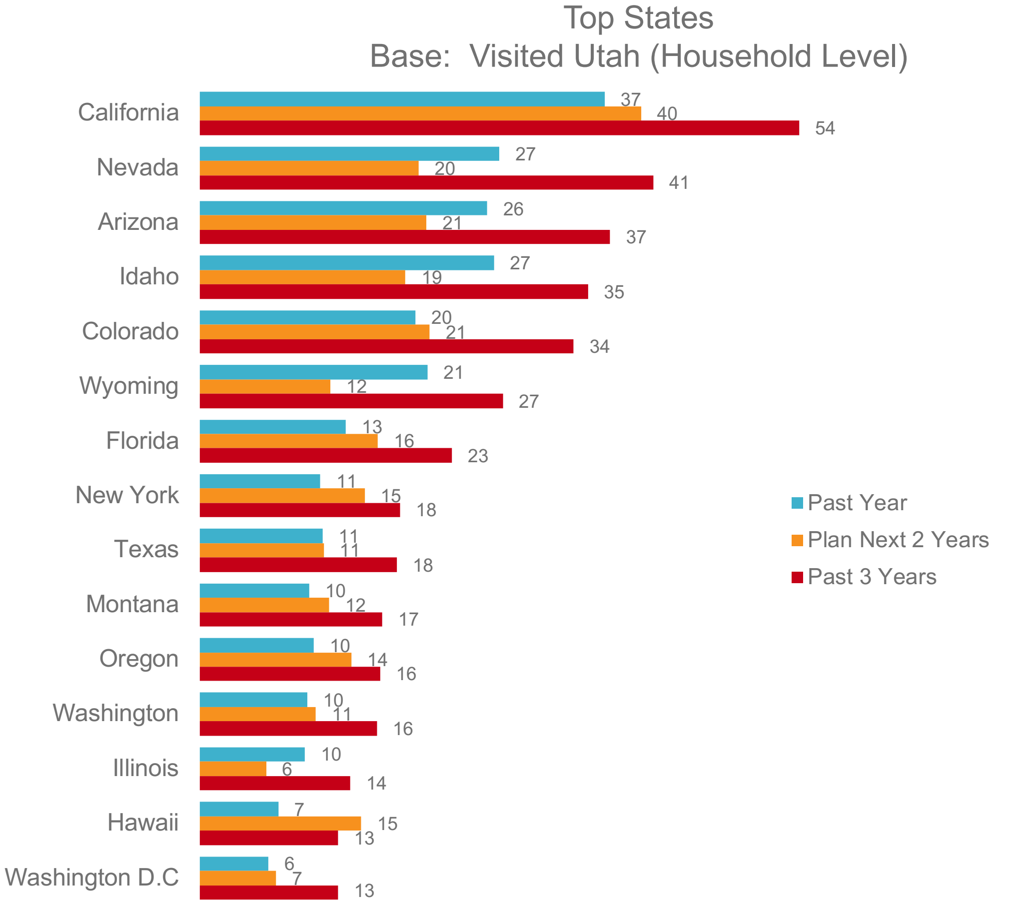
Note: Respondents may select more than one destination (percentages may sum to more than 100%); not all destinations are listed
Q4d. Please indicate the cities/places visited in state . . . (State Level – demo wtd.)

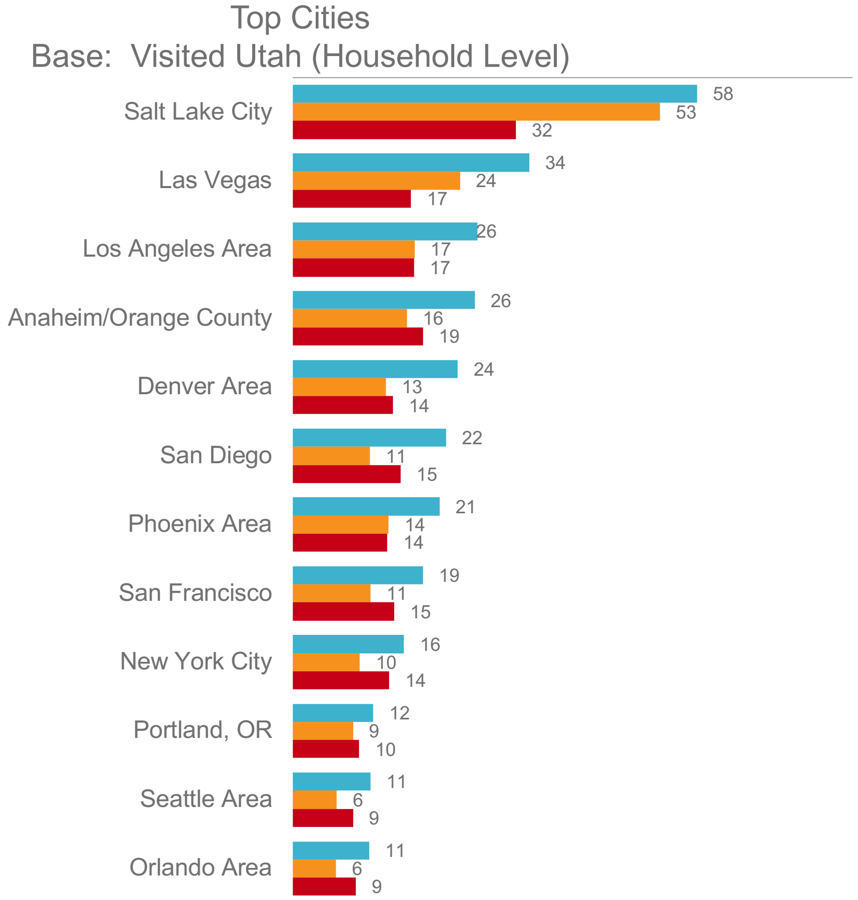
Other Western areas dominate the competition with Utah

- The top non-Western state (Florida) ranks seventh; of the top 10 cities, only New York City places outside the West.

Other Areas Visited by Utah Visitors (Key Competitors)

% Visiting State/DMA Past Three Years (Ranking), Past Year, Planned Next Two Years (7%+)



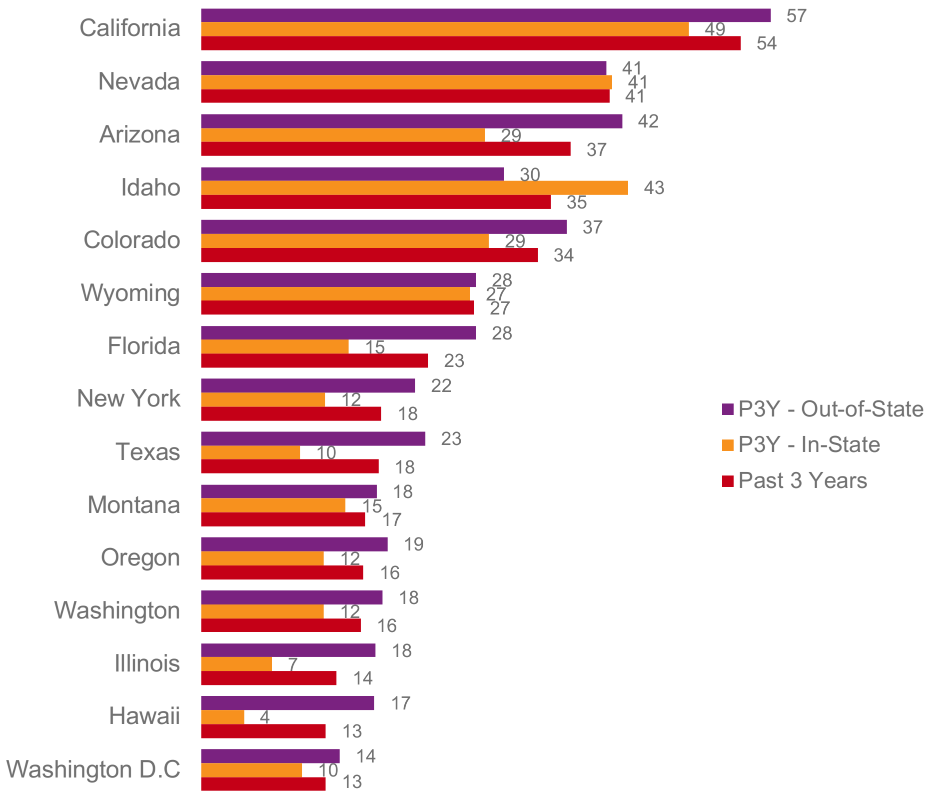


California and Nevada are the top competitors, followed by Arizona, Idaho, and Colorado

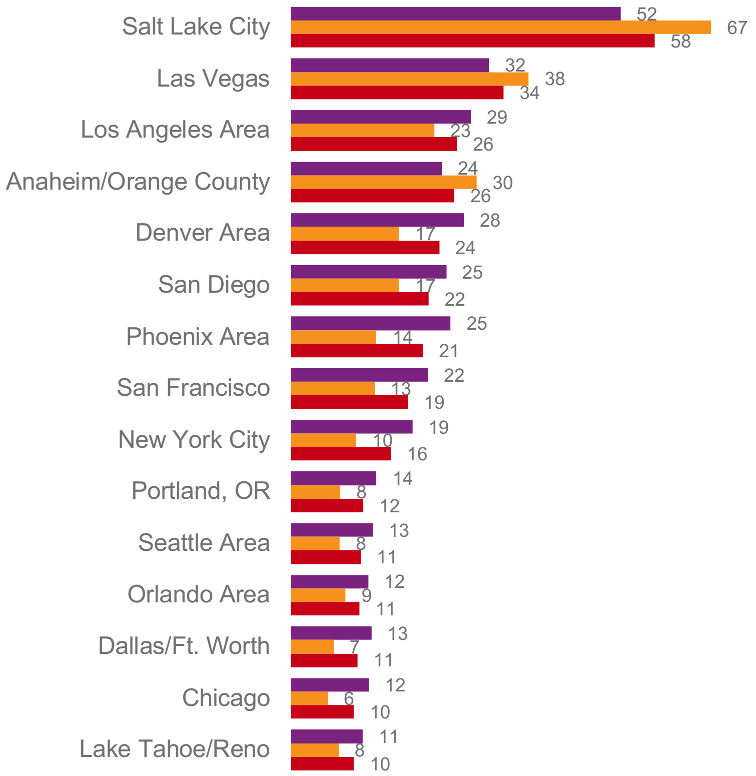
- Both In-state and Out-of-State visitors opt for neighboring Arizona, Idaho, Colorado, and Wyoming.
- SLC dominates city choices, especially among residents; Las Vegas appeals to all and is slightly above the next two MMAs, LA and Orange County.

Other Areas Visited by Utah Visitors in Past 3 Years (Key Competitors)
Past Three Years (Ranking) Total, In-State, Out-of-State (10%+)

Top States
Base: Visited Utah (Household Level)

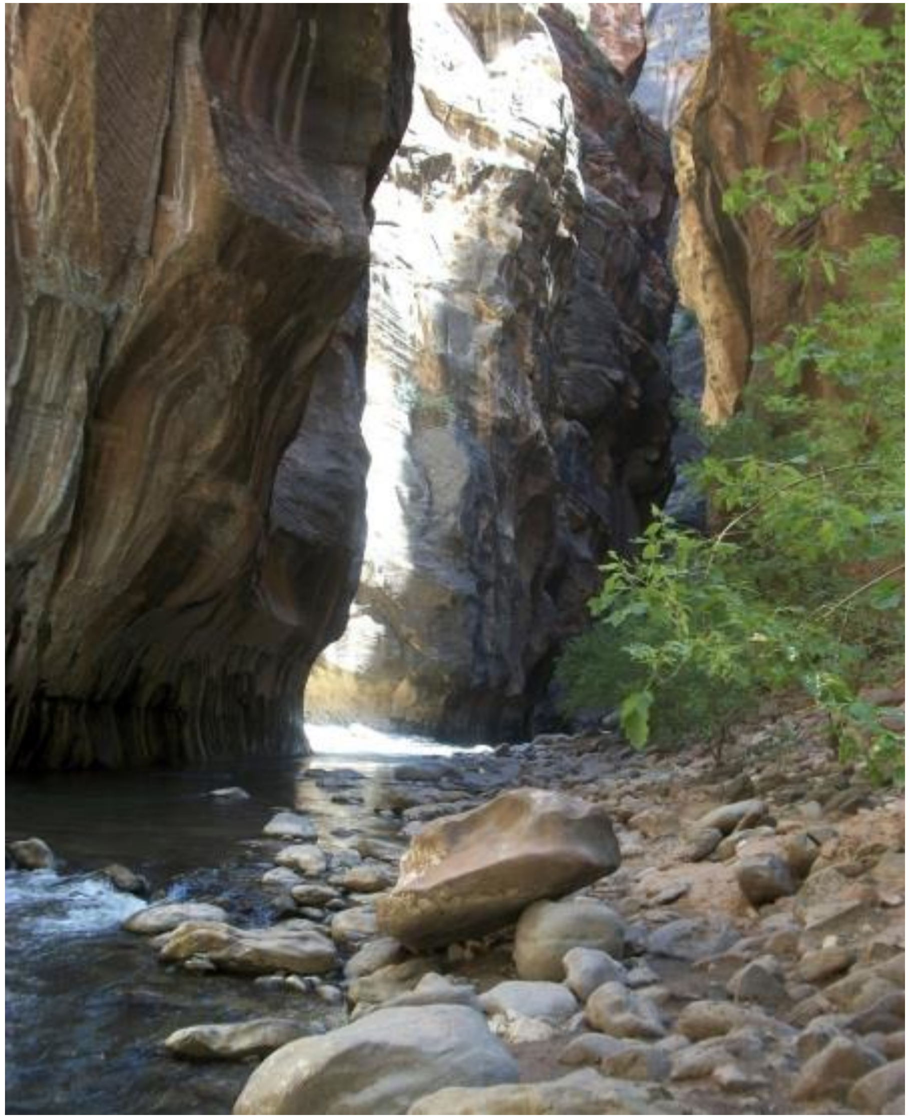


Top Cities
Base: Visited Utah (Household Level)



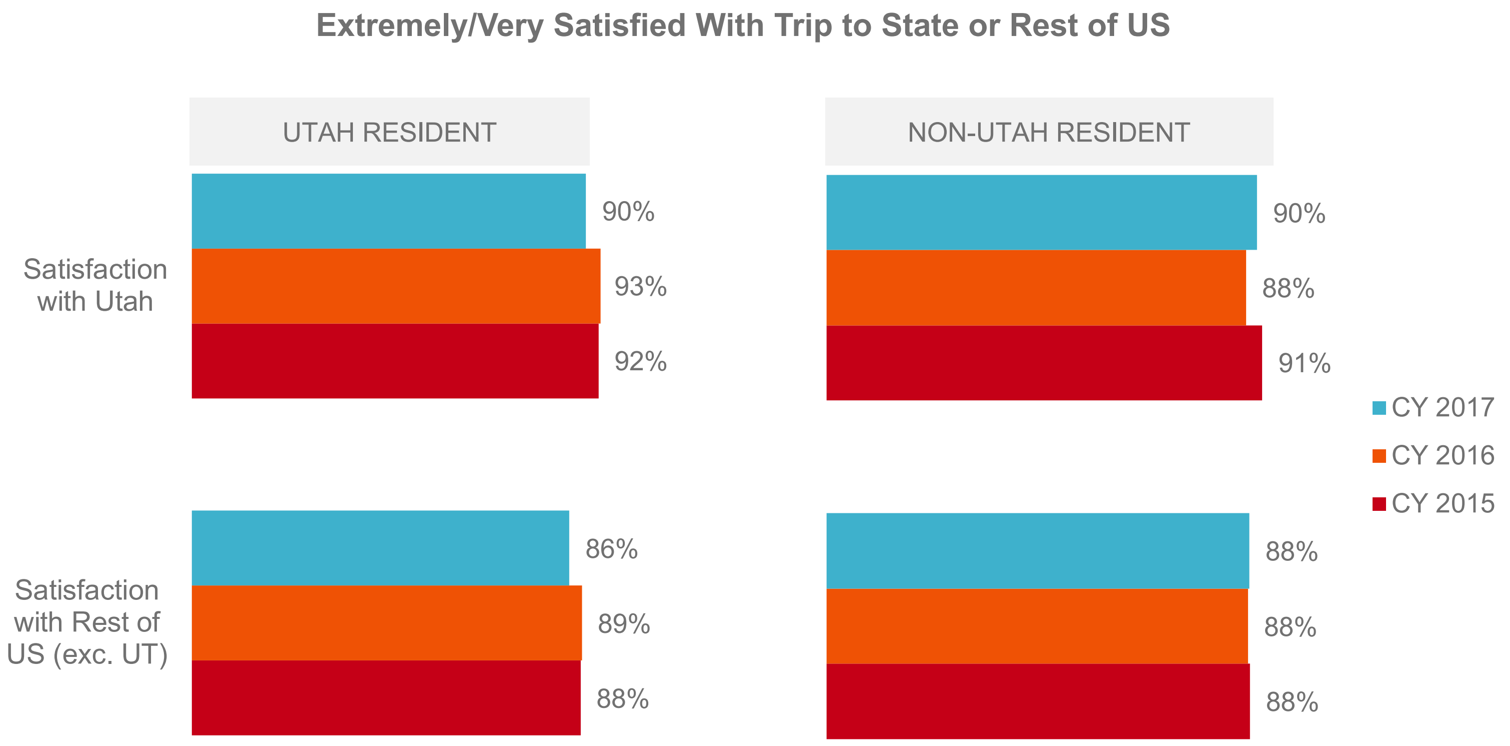
Q7a: Please indicate US states visited for leisure in past three years.
Q8a: US cities visited past three years.

9
Satisfaction



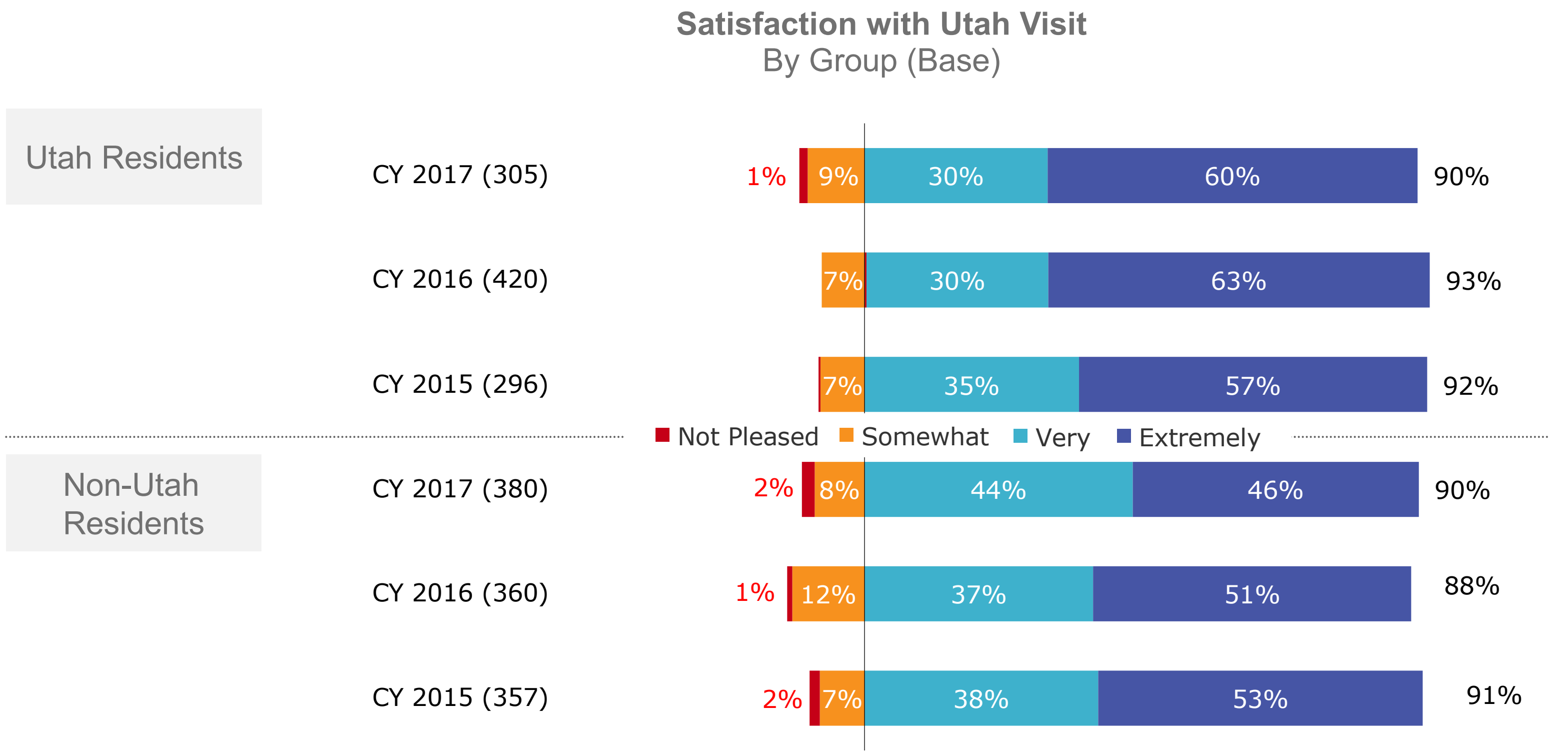
Utah sends most visitors home happy

- Out-of-State resident satisfaction nudged upwards while those within Utah dipped. This year, satisfaction was equal for both In-State and Out-of-State residents.
- In-staters view Utah more favorably than they do the rest of the US; out-of-staters assign equal satisfaction.



Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with (area indicated at far left). (State Level – demo wtd.)

Satisfaction dips slightly among residents, recovers slightly Out-of-State visitors

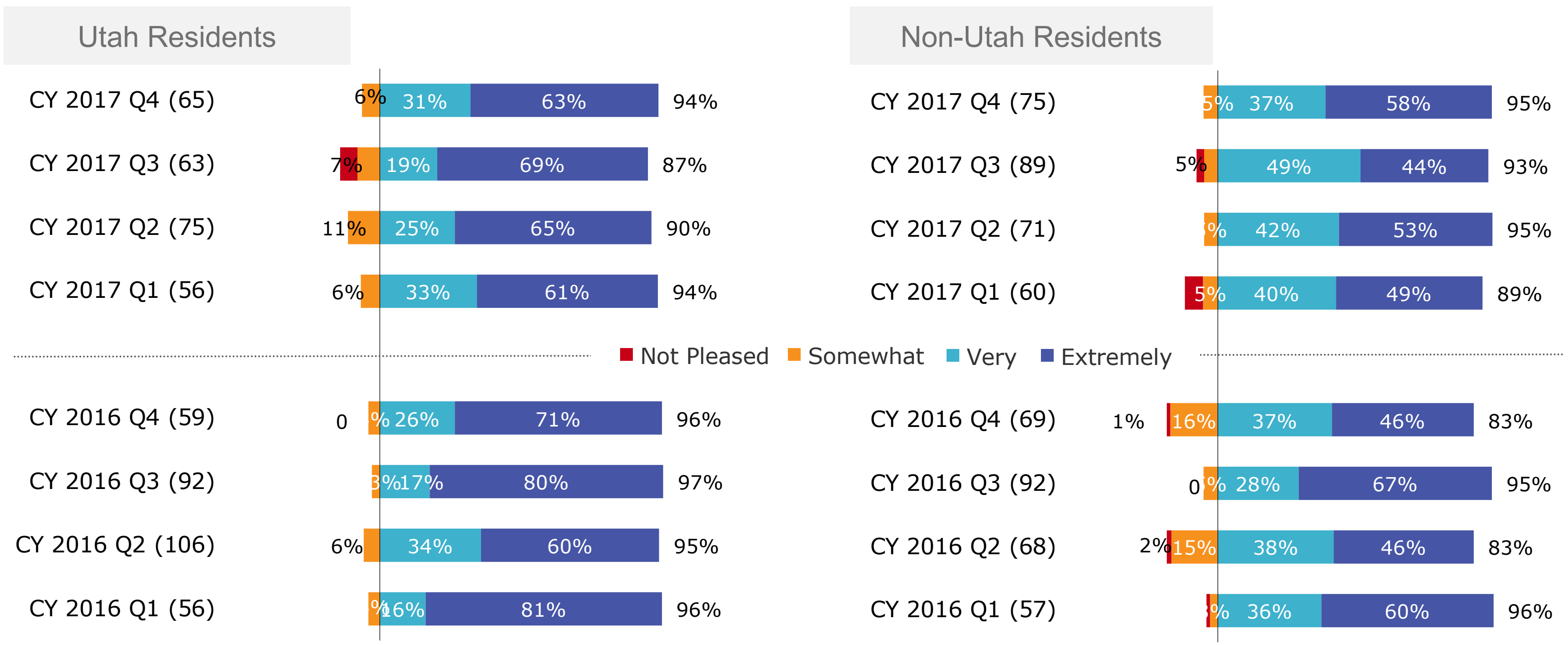


*Note: Not pleased includes *Not At All* and *Not Very Pleased*

Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with Utah. (State Level-demo wtd.)

Analyzing leisure visitors, Utah satisfaction continues to be strong throughout the year

- In-state leisure visitors usually note stronger satisfaction than non-residents, as noted in the percent of extremely satisfied visitors.



*Note: Not pleased includes *Not At All* and *Not Very Pleased*

Q4l: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with (area indicated at far left). (State Level – demo wtd.)

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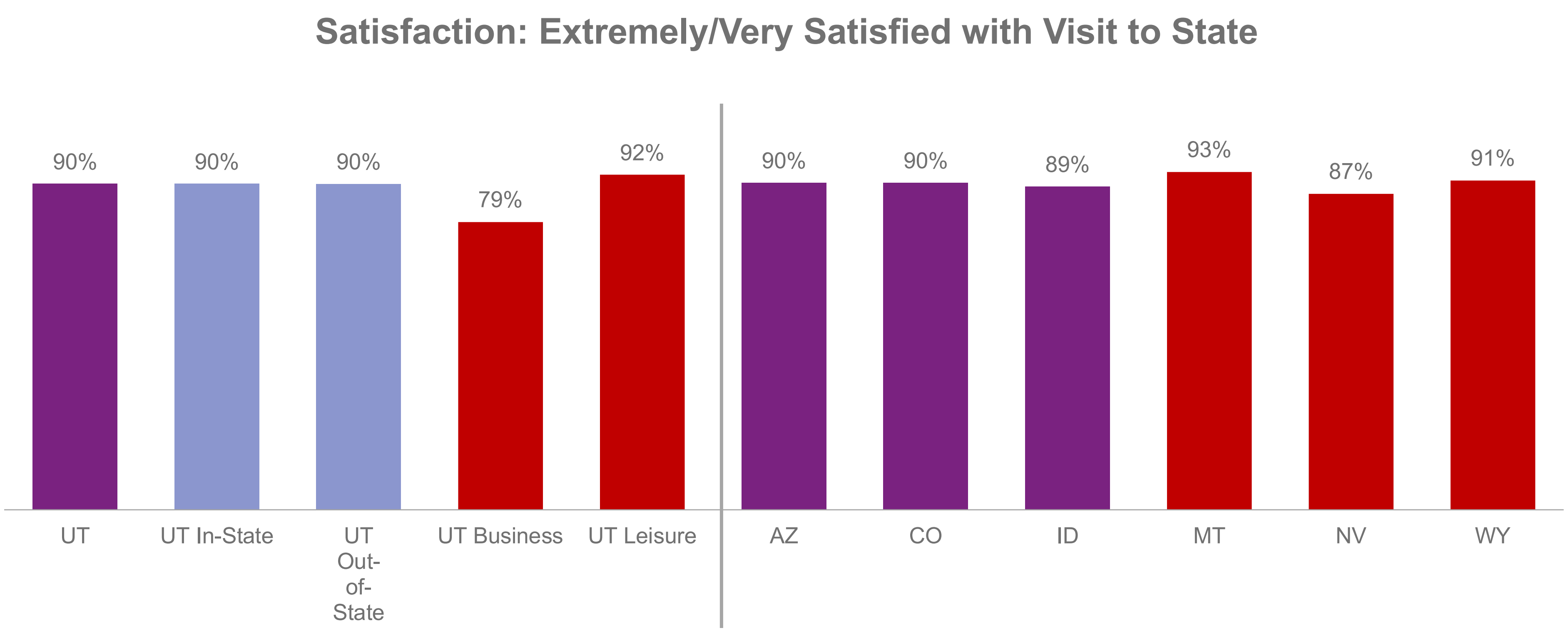
Utah competes well among the competitive set in satisfaction; One area to monitor is lower satisfaction among business travelers

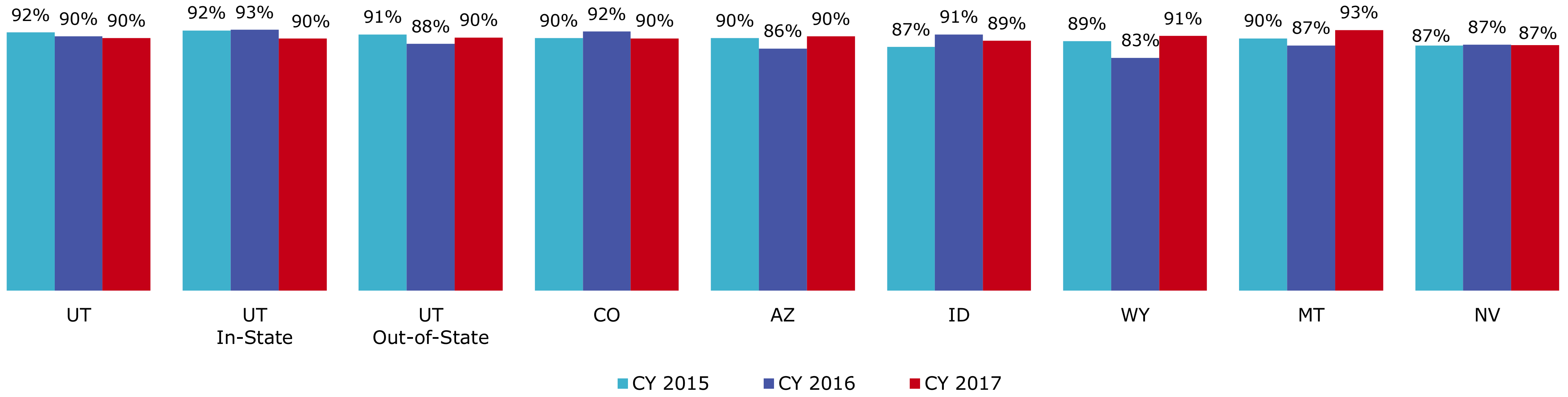


Q4l: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with … (State Level-demo wtd.)

Utah and competitors remain highly rated

- Visitors to competing States reported similar levels of satisfaction with the exception of Nevada which was slightly lower.

Satisfaction: Extremely/Very Satisfied with Visit to State



Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with … (State Level-demo wtd.)

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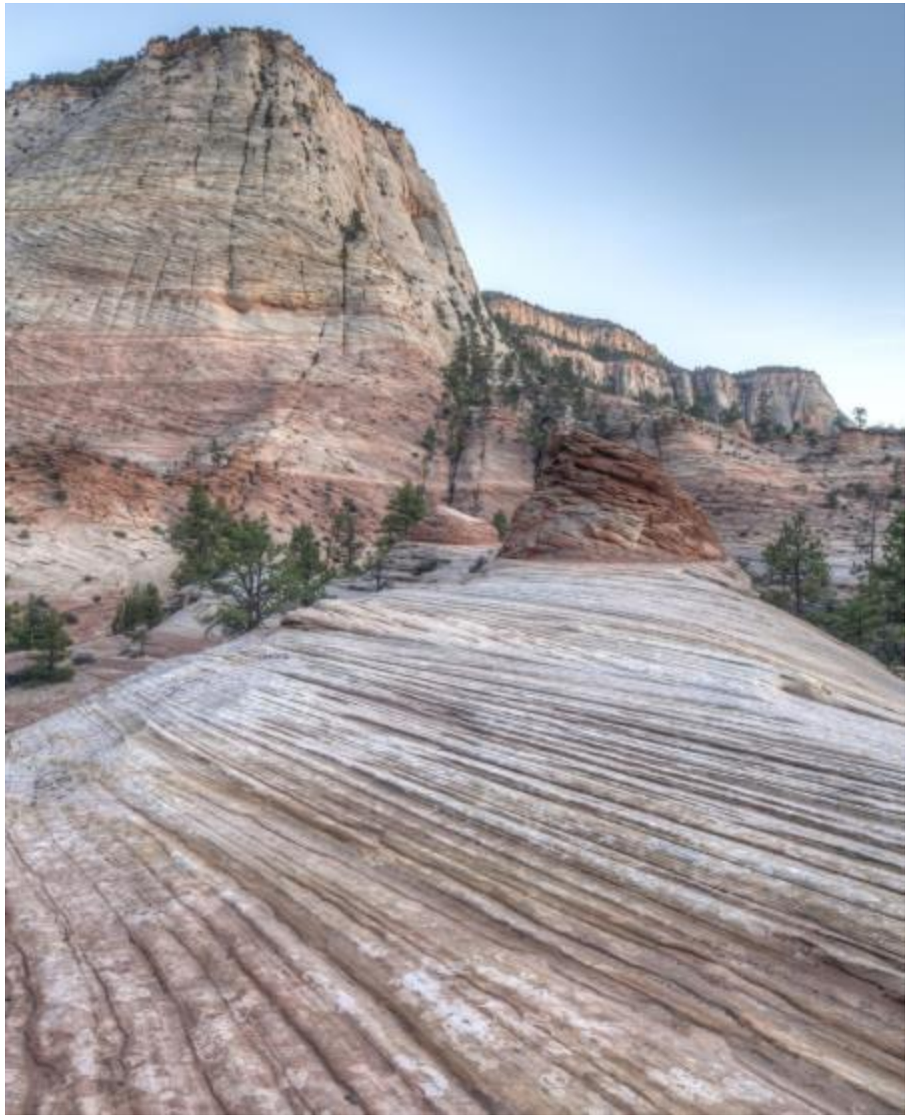
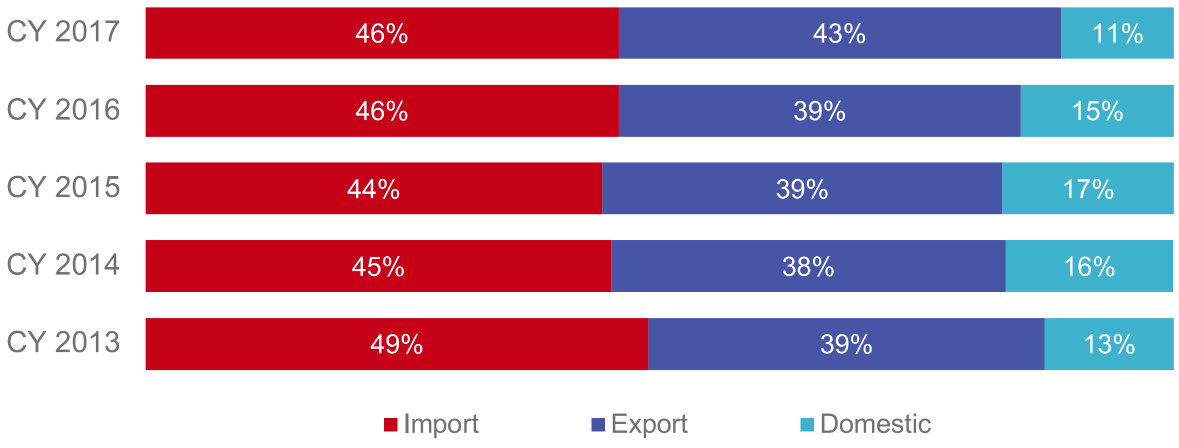
10
Export/Import



Export/import "Balance of Trade" remains in place

- Utah continues to import more tourism than it exports ("balance of trade" deficit)
- However, adding Utah residents' spending inside the state ("domestic" spending) lifts total tourism dollars spent in Utah above the total spent by residents elsewhere.
- *Note: Spending that occurs outside the state by non-residents are not included in the chart.*



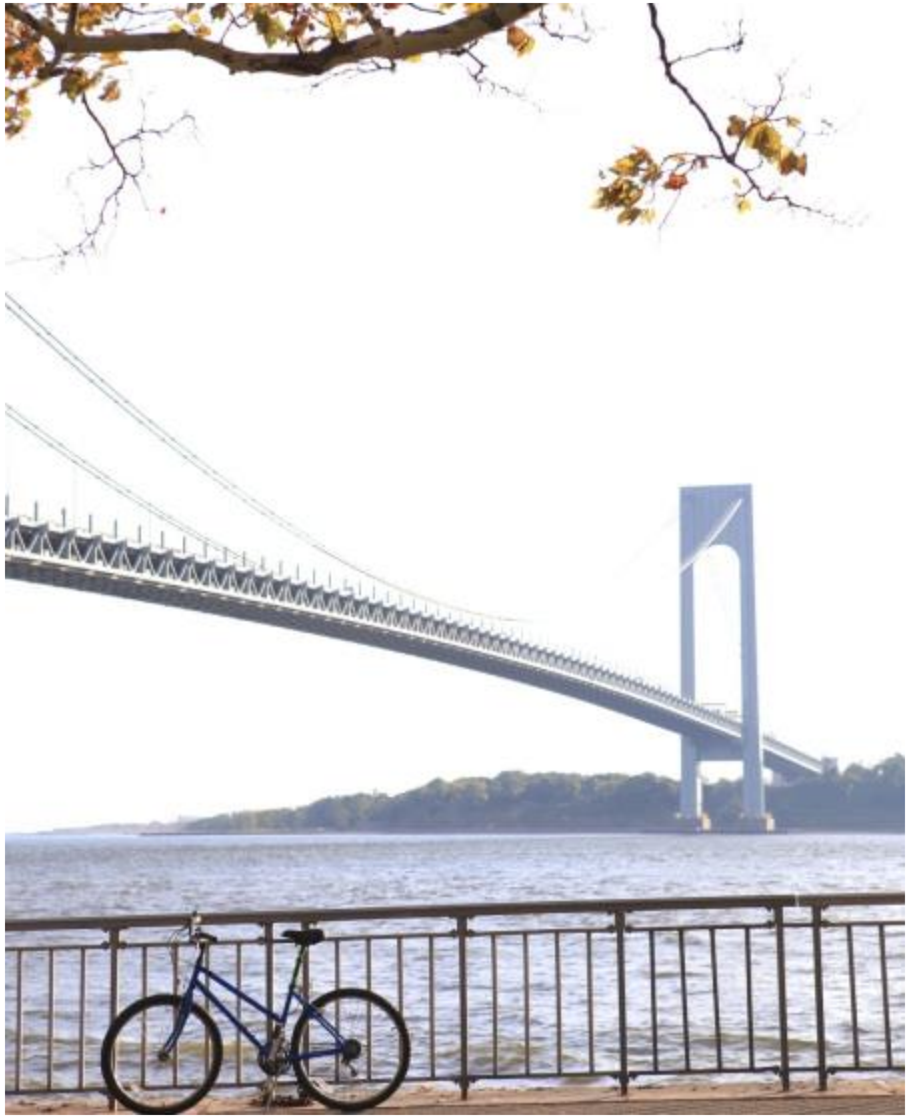
Import represents $ leaving UT

Export represents $ coming into UT

Domestic represents $ staying in UT

Note: Spending that occurs outside the state by non-residents is not included in the chart.

11
Demographics



Utah visitor average incomes rose this year, primarily due to higher improvements among In-State visitors

- Additionally, compared to out-of-state visitors, in-state visitors are younger, more likely living in families (3+ in household), more likely to be Caucasian.

Demographics	All US Travelers 2016	All US Travelers 2017	Utah Visitors Total 2016	Utah Visitors Total 2017	Utah In-State Visitors CY 2016	Utah In-State Visitors CY 2017	Utah Out-of-State Visitors CY 2016	Utah Out-of-State Visitors CY 2017
Average Age	46	46	46	44	45	42	46	46
Average Household Income	$80,600	$84,500	$70,000	$82,400	$54,500	$73,400	$83,000	$84,600
% Male	31%	44%	28%	42%	27%	43%	29%	44%
% Married	60	61%	70	71%	73	68%	68	60%
Household Composition								
% One Person	16	16	14	11	14	11	14	16
% Two People	38	39	39	37	36	32	41	39
% Three or More	46	45	47	53	51	57	44	45
Ethnicity								
% Caucasian	84	84	92	90	95	92	89	84
% African-American	7	7	1	1	0	1	2	7
% Spanish Origin	8	8	4	6	4	7	4	8

Panel: Age, Income, Children, Ethnicity. (Household Level – demo wtd)

Overnighters and out-of-state visitors continue to report higher incomes

- Otherwise, overnighters generally share similar characteristics as day-trippers
- More out-of-state leisure visitors travel in pairs, impacting activity choices, while their higher incomes boost spending in Utah.

Demographics	Utah Visitors Total 2017	Utah Leisure (LS) Visitors	Utah Business Visitors	Utah Day-Trippers	Utah Overnight (O/N) Visitors	Utah In-State O/N LS Visitors	Utah Out-of-State O/N LS Visitors
Average Age	44	44	43	44	44	39	46
Average Household Income	$82,400	$82,900	$85,500	$70,500	$86,500	$62,700	97,800
% Male	42%	43%	32%	51%	40%	42%	40%
% Married	71%	71	67	79	68	71	66
Household Composition							
% One Person	11	10	7	9	11	9	13
% Two People	37	38	37	33	38	31	43
% Three or More	53	52	56	58	51	60	45
Ethnicity							
% Caucasian	90	91	80	90	90	94	89
% African-American	1	1	0	1	1	0	1
% Spanish Origin	6	6	3	3	7	7	8

LS=Leisure
O/N = Overnight

Panel: Age, Income, Children, Ethnicity. (Household Level – demo wtd)

Visitor demographics vary by state, especially income

- Visitors to Utah are slightly younger, more likely to be male, and more likely to have larger households compared to most States in the competitive set.
- Average incomes were in the middle of group, below NV, CO, AZ, WY; but higher than ID and MT.

Demographics	Utah Visitors CY 2017	Colorado Visitors CY 2017	Arizona Visitors CY 2017	Idaho Visitors CY 2017	Wyoming Visitors CY 2017	Montana Visitors CY 2017	Nevada Visitors CY 2017
Average Age	44	44	48	47	47	48	49
Average Household Income	$82,400	$94,900	$88,200	$79,700	$90,400	$76,600	$99,500
% Male	42%	46%	44%	41%	42%	39%	49%
% Married	71	63	65	69	64	69	62
% In-State Visitor	31	32	33	26	18	36	12
Household Composition							
% One Person	11	13	15	10	12	21	16
% Two People	37	40	41	48	44	46	42
% Three or More	53	47	44	42	44	34	42
Ethnicity							
% Caucasian	90	89	87	93	89	91	78
% African-American	1	2	3	1	3	1	4
% Spanish Origin	6	10	9	4	3	2	8
Total Households (Census)	918,367	2,051,616	2,448,919	596,107	226,985	412,653	1,030,701

Census: http://quickfacts.census.gov/qfd/index.html
Panel: Age, Income, Children, Ethnicity. (Household Level – demo wtd)

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Glossary and Research Methods

Glossary

Term	Definition
Balance of Trade	Net Export-Import (Surplus = +; Deficit = -)
Import	Money departing the state (Utah residents vacationing elsewhere)
Export	Money entering the state (Non-Utah residents visiting Utah)
Domestic	Money remaining in state (Utah residents vacationing inside their home state of Utah)
DMA	Designated Market Area: Counties that share the same primary TV broadcast signals (210 DMAs in US)
Calendar Year	January 1 through December 31
In-State	Utah Residents
Out-of-State	Non-Utah Residents
Person-Trip	Total person-trips are all trips taken by all people; i.e. a couple taking three trips counts as six (two people, each taking three trips)
Respondent/Household Level	Respondent information – one count per respondent
Source of Visitors	Residence of visitors
State/Region Level	Information about all trips taken to a particular state/region (each trip to area counts)
Travel Party	Traveler plus all companions, including children
Trip	Travel 50 miles or more (one-way) away from home or stayed overnight. Excludes commuters or commercial travel (flight attendants, commercial vehicle operator). This eliminates some leisure day trips that are closer than 50 miles from home
Trip Level	Information about all trips – each trip counts
Trip Volume	All trips summed together
Visitor	Person who has visited Utah in the past month; all are US residents, thus, travel is domestic travel only (domestic consumer). The focus of this report is a Utah Visitor Profile Study, January – December 2016.

Type of activity summary

Art & Culture	Art galleries, historic sites/churches, museums, musical theater, Native American ruins/rock art, local folk arts/crafts, old homes/mansions, theater/drama, symphony/opera/concert, musical performance/show
Adventure Sports	Hang glide/skydive/base jump, hike/backpack/canyoneer, mountain biking, rock/mountain climb, scuba dive/snorkel, ski/snowboard, water ski, whitewater raft/kayak/canoe
Sports and Recreation	ATV/fourwheeling, bike, fish, golf, horserace, horseback ride, hunt, motor sports (NASCAR/Indy), motor boat/jet ski, sail, snowmobile, snow sports besides ski/snowmobile, sports major/pro, sports youth/amateur/collegiate (spectator or participant), tennis
Nature/ Outdoor Activities	Beaches, bird watch, camp, caverns, nature travel/ecotour, wildlife view, zoos, farms/ranches/agritours, other nature (photography, rockhound, etc.)
Entertainment/Amusement	Casino/gaming, fine dining, nightclubs/dancing, rodeo/state fair, shop, spa/health club, special events (e.g., Mardi Gras, hot air balloon races), theme park, wine taste/winery tour, craft breweries (small, independent, traditional brewers), distilleries
Family Activities/Reunions	Family reunions, high school/college reunions, visit friends, visit relatives
Sightsee	Rural sightsee, urban sightsee, see area where a TV show or movie was filmed
Parks and Gardens	Gardens, state parks/monuments/recreation areas, National parks/monuments/recreation areas

Research methods

DATA COLLECTION PROCESS	

DATA COLLECTION PROCESS

- OmniTrak Group uses its US panel to manage sample for TravelTrakAmerica
- Monthly e-mail invitations are sent to representative households; quotas are set for age, income, and region
- Usually starting in the middle of the first week of a month, the field period runs two to three weeks
- Final data are weighted as follows:
  - Demographic combinations of region, state, age, and income to reflect the current characteristics of US households
  - Trip and state projection calculations count every trip taken by respondents; detailed information is collected for up to three trips in the past month and projected to the number of households in the total US
  - In addition, a few tables represent person-trips – these take into account the immediate travel party size for each household as well

Utah Visitors and Total Travelers For Calendar Year ending December 31, 2017

CY 2016 Travelers (Unweighted Respondents)	CY 2017 Travelers (Unweighted Respondents)	CY 2016 Travelers (Weighted by Demographics)	CY 2017 Travelers (Weighted by Demographics)	Region
568	1,039	695	934	Utah Residents
694	532	829	529	Utah Visitors (Trips)
57,930	61,293	58,792	58,948	Total for TravelsAmerica

Thank you

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Case Study

Case study: TNS Custom Targets for TravelNevada deliver significant lift in site conversions

Business issue

Our client, TravelNevada, wanted to increase leads and conversions through an online ad campaign.

Precise action

TravelNevada used TNS Digital Segment Targeting, powered by our Custom Research Targets, to reach the right consumers with the campaign – those willing to travel to Nevada in the future.

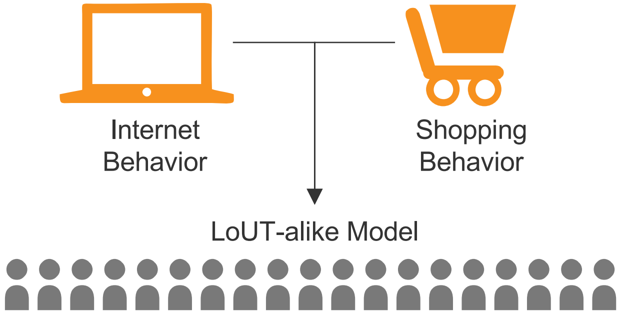
Additionally, TravelNevada was first in the tourism/hospitality industry to make use of Digital Segment Targeting – reaching a precise audience at scale, based on mindset.

NEVADA
A WORLD WITHIN.
A STATE APART.

Case study: Executing TravelNevada's campaign

1 TNS custom research identified consumers willing to travel to Nevada

2 The audience was scaled by a leading Data Management Platform (DMP) to find 15 million similar consumers through a loUT-alike model



3 The 15 million unique coUTies were added to the media plan and targeted directly

Result

The campaign delivered a conversion rate that was 26% greater than standard display ad targeting*

*The campaign was tracked by a 3rd party media agency. The TNS campaign impact was measured by comparing TNS targeting conversion rate vs. other targeting methods on the same platform. Both target audiences shared identical traits (e.g. demos, ad frequency and messaging, metro areas, etc.).